

TOURISM DEVELOPMENT
IN
ONTARIO NORTH OF 50°

Volume One
Issues and Policy Options

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Royal Commission on the Northern Environment

From the Office of
the Commissioner

PREFACE

Relationship of Tourism to the Commission's Mandate

The mandate of the Royal Commission on the Northern Environment directs me to make recommendations concerning both the manner in which the development of major enterprises takes place in Ontario North of 50° and the means whereby decisions to undertake such enterprises are reached. Hence this Commission's program has been governed by my two overriding concerns. One is to find ways of ensuring that development, when it occurs, proceeds in an orderly fashion, working in concert with and not at the expense of the environment. The other is to explore various means of ensuring that northerners are involved effectively in decision-making on issues that affect them.

I regard tourism as a major enterprise having far-reaching implications for social and economic development, resource allocation and management, and environmental protection in all parts of Ontario North of 50°. And, for several reasons, I consider it to be a particularly appropriate enterprise for native people living in communities beyond the reach of the present network of all-season roads. The tourism sector clearly offers attractive opportunities for new development in the far north, with prospects for generating substantial income and employment for the people living there as well as benefits to the province as a whole. Tourist activities consume resources but need not deplete the basic stock of renewable biological resources on which they mainly depend provided that these resources are managed according to sound sustained-yield practices. Moreover, I am convinced that implementation of multiple-use resource allocation and management principles would permit tourist operations to co-exist over the long term with traditional, community-based trapping, hunting and fishing activities.

Native people and others living in Ontario North of 50° are understandably apprehensive that tourism could develop without adequate sensitivity to their circumstances and interests — that most of the economic benefits would leak outside the region while the adverse social and cultural impacts would be borne within it.

This must not happen, and need not. I believe that the kind of development that does occur must take advantage of the residents' existing economic and cultural relationships with their natural environment, secure a flow of benefits into their communities, and involve them fully in all aspects of planning, decision-making and facility operation.

Objectives and Scope of the Study

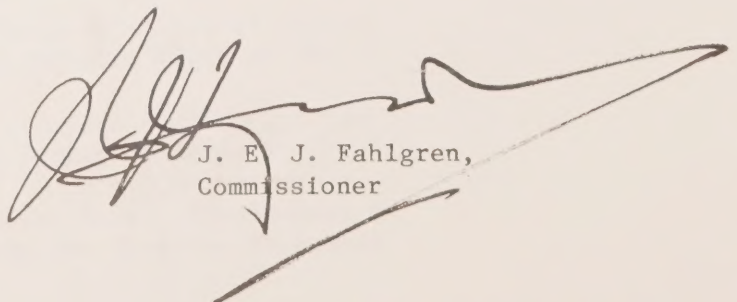
The Commission undertook this study of tourism prospects for Ontario North of 50° in order to obtain an assessment of the opportunities available, a set of realistic alternatives for tourism development, and a view of tourism's place in the spectrum of competing demands for the region's natural resources.

Since specialized wilderness resource-based tourism, encompassing hunting, angling, camping and travel, is clearly the most appropriate type for the greater part of Ontario North of 50°, the Commission's terms of reference for the study accorded it priority. Issues of general tourism and outdoor recreation were to be dealt with also, but only to the extent that they are manifest north of 50° or are likely to impinge on wilderness tourism there.

Implications for Further Action

The production of a development plan for the tourism sector is sorely needed but beyond the scope of my Commission. However, I am pleased to find that the study has an essentially practical orientation that will help others to draw up proposals that can be implemented, since it evaluates alternative policies and strategies for the allocation and management of renewable and terrain resources, for tourist market exploitation, for investment in tourist facilities and maintenance and management of them, and for attainment of local income and employment impact.

This study forms a crucial part of this Commission's research. I am relying on its findings, as well as on public submissions on tourism matters, in formulating my final recommendations. The reports on various aspects of tourism development will undoubtedly prove useful to those having responsibilities for planning and decision-making in the tourism field and can serve as a major source of information for participation by interest groups and the public generally in the planning and decision-making processes.



J. E. J. Fahlgren,
Commissioner

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This publication has been prepared for the Royal Commission on the Northern Environment. However, no opinions, positions or recommendations expressed herein should be attributed to the Commission: they are those solely of the author.

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ISSUES AND POLICY OPTIONS

INTRODUCTION

Terms of Reference

The terms of reference for this study of *Tourism Development in Ontario North of 50°* established three main objectives:

- 1) to assess the magnitude and socio-economic significance of development opportunities for wilderness-based tourism in the region;
- 2) to design a set of alternative policies and strategies to ensure that prospective local entrepreneurs are placed in a position to effectively exploit and benefit from these opportunities; and
- 3) to evaluate the future role of tourism within the context of increasing general development pressures and their associated economic, social and natural environmental consequences for people and resource uses in the region.

The terms of reference further stipulated that this study should focus primarily on wilderness-based tourism, while according treatment to resort and family oriented tourism and outdoor recreation only to the extent that they are manifest north of 50° or likely to impinge on wilderness tourism in the region. They also established that the study was to present options for future consideration rather than hard recommendations or a development plan for tourism.

Scope and Methodology

The terms of reference also set out a number of specific investigations to be undertaken towards meeting the main objectives: data assembly; evaluation of natural resource supply for tourism, current tourism development, and markets; estimation of prospects for development; identification of alternative strategies for resource allocation and management, market penetration, investment, operational efficiency, and maximization of economic impact; and evaluation of these alternative strategies in terms of their social, economic and natural environmental implications.

As set out in its terms of reference, the study was conducted in three phases, the first entailing reading and interviews to establish viewpoints of interest groups and assemble basic documentation, the second calling for the assessment of opportunities, strengths and weaknesses associated with tourism, especially wilderness-based tourism, and the third culminating in the portrayal of alternative policies and strategies for resolving issues confronting tourism and for securing viable and beneficial tourism development.

Problems and Limitations

As it turned out, the study has had to deviate in several respects from the terms of reference established for it. The volume of information available for some facets of the work — supply aspects and transportation infrastructure, for example — was found to be too massive to do full justice to. On the other hand, reliable data on such topics as current facility operations and markets proved to be unobtainable, given the resources available for the study. Certain key documents on government policy were withheld.

Finally, circumstances beyond the control of this research stood in the way of an effective contribution by native people to either the data base used or the preparation of the statements on issues and policy options. This is a crucial defect; in effect, native people have been placed in a retrospective reviewers' position in relation to this study, rather than a prospective contributors' position. All the more reason, then, for their response to the published report, and their viewpoints on tourism generally, to be accorded full consideration in future planning and decision-making having to do with the development of tourism in Ontario North of 50°.

Presentation Format

The results of this research are presented in five volumes. This volume summarizes the main issues confronting the development of tourism in Ontario North of 50° and identifies and evaluates the range of policy and strategy alternatives for resolving them. It represents essentially a synthesis of the perspectives and insights gained during the course of this research, and employs novel approaches to the categorization of both issues and alternatives.

The four other volumes in the set present detailed technical information and evaluations for four key components of the tourism field: the climatic foundations, the heritage resource foundations, transportation infrastructure, and tourist facility development. While they do not cover the entire spectrum of subjects considered in this research, they provide the main factual and evaluative background for this volume on issues and options.

FART ONE

SUMMARY OF ISSUES

PART ONE

SUMMARY OF ISSUES

UNIVERSAL AND UNIQUE ASPECTS

This summary brings together the various issues discussed in the separate reports dealing with climate, heritage resources, transportation infrastructure, and tourist facility development, together with others identified during the conduct of the tourism study. The broader categories devised for the ordering and presentation of these issues are those considered useful for facilitating the work of the Royal Commission on the Northern Environment and the deliberations of decision-makers in government and private entrepreneurs having a stake in the tourism field.

Many, and perhaps most, of the issues and sub-issues discussed here are encountered in one form or another in the world's literature on tourism. In this general sense, the issues of any region are not unique and much can be learned from the responses to similar concerns elsewhere. Even so, particular solutions that have worked elsewhere cannot be simply transplanted into any individual region, such as Ontario North of 50°, because each region has a unique character imposed by physical and social environments that are replicated nowhere else. Identification and accommodation of both the universal and unique aspects of an issue are prerequisites for its successful resolution.

Moreover, issues in the tourism field are interrelated with those in other fields and cannot be satisfactorily resolved without reference to them. Indeed, the issues related to tourism in Ontario North of 50° are particular manifestations of broader ones and can be subsumed under broader categories that transcend the tourism field. Issues of access to information, involvement in decision-making, accountability, resource allocation and management, heritage preservation, marketing, economic impact, and planning are as relevant to development generally as they are to the tourism development sector in particular.

CLARIFICATION OF CONCEPTS AND TERMINOLOGY

An operational definition of the concepts and terminology of the summary statement that follows is considered essential, given the confusion and ambiguity that currently surround this general area of discussion. The intent is entirely pragmatic, namely to attain clarity within the limits of this study. No attempt is made to provide a comprehensive treatise on issues in resource planning and management in the public and private sectors.

DEFINITIONS

For the purposes of this study an issue is defined as a disputable or contentious matter:

- involving something of major significance for tourism,
- in which there is widespread interest and discussion, and
- for which the time for decision-making is propitious.

The differentiation of issues by type and focus of interest is summarized in the following chart.

CHART 1

SCHEMA FOR ISSUES

Type of Issue	Focus of Interest
1) Public/political policy	Citizens at large and political groups
2) Government administration	Government administrators
3) Private tourism sector	Tourism associations or tourism industry as a whole

In this report, issues of the first type — those that focus on policy values, preferences and implemental strategies and involve the general public, political groups and senior government executives — receive attention. Issues of types 2 and 3 are considered beyond the primary concerns of this study.

ORIGIN OF ISSUE STATEMENTS

The broad, fundamental issue categories were derived from a synthesis of information gained from examination of the literature and discussions with knowledgeable government and private individuals and groups. The individual issues and sub-issues more frequently represent a simple or direct recording procedure. Two points require note.

Firstly, discussions with individual private sport camp operators and air carriers involved in the business were limited, primarily due to time constraints. It is felt, however, that the much more extensive contacts made with government administrators and the executives of tourist/travel associations in the region provided an adequate appreciation of the scope and priority of issues. Public review of the report may result in some elaboration in detail or the identification of additional examples of the issue statements. However, the general thrust will likely remain unchanged.

Secondly, contact with native people was limited to an exploratory discussion with Treaty No. 9 and meetings with a few camp operators. An extensive review and public discussion of this report in the native settlements, particularly by sport camp operators and local band officials, may lead to the identification of new types of issues and a deeper appreciation, elaboration or revision of those listed.

FRAMEWORK OF ISSUES

There are numerous possibilities for organization of the individual issues identified during the course of the study. The system imposed was governed by pragmatic considerations, that is, by the needs as defined by the primary objectives of this study. Initially, the issue statements were assembled under major divisions of the tourism field, including supply, demand/market, planning, financing, and economic and social impact. The results of this initial procedure are evidenced to a considerable extent in the issues and sub-issues presented.

The second stage of the classification, resulting in the development of issue categories and some of the more generalized issue statements, involved a distinctly different procedure. Here, a synthesis that was both inductive and deductive in nature was involved. To a considerable degree, the process reached beyond the limits of the tourism field to the broader spectrum of socio-economic development throughout Ontario North of 50°. The specific tourism issues were then incorporated as integral components within the framework of general issue categories. In this manner, the tourism issues were linked to the broader interests and concerns of the Royal Commission on the Northern Environment.

CLASSIFICATION OF ISSUES

CATEGORY A: RELATED TO ACCESS TO INFORMATION

This category of issues centres around the freedom, timeliness and ease of access of the tourism sector to information concerning government's decision-making, administrative structures, and planning related to the allocation, maintenance and development of natural resources and the environment. It includes concerns arising from government's activities at both the political and the administrative level. Tourism provides only one example of a wide range of social and economic sectors upon which this issue category impacts. Moreover, this category has important constraining relationships for many specific tourism sector issues noted subsequently under other categories. Equally important, access to information is a fundamental prerequisite for the satisfactory resolution of the category of issues concerned with public participation in the decision-making process.

Administratively, this category of issues revolves largely around the operations of the Ministries of Natural Resources and Northern Affairs. The former is responsible for the maintenance and allocation of the land and water resources on which so much of the tourism industry is based. The Ministry of Northern Affairs determines much of the overall policy and provides considerable stimulative funding through its budget appropriations and the administration of federal-provincial cost-sharing agreements. The Ministries of Transportation and Communications and Tourism and Recreation are also involved to a considerable degree.

Issue 1: Government versus Private Tourism Industry Responsibility for the Identification of Available Information

Government has accepted responsibility for the preparation of lists of available publications and their public distribution. It is clearly the responsibility of the tourism industry to examine these in relation to its particular interests. There are, however, a host of internal government reports of committees, task forces and working groups containing new or condensed and interpreted versions of existing data that are, or could be, of immense value to the tourism industry. These are often considered by provincial government administrators to be restricted, or are not offered until identified and specifically requested. Timely and significant information that could often play a vital role in decision-making affecting tourism, therefore, lies beyond knowledge or reach of those whom it most vitally affects, in this case the residents of Ontario North of 50°. Cases in point are the high degree of secrecy surrounding the report of the Task Force on Parks Systems Planning (often termed the Monzon Report after the Chairman of the group), the delayed release of this report, and the reluctance of the Ministry of Natural Resources to provide internal documentation on such subjects as its policies on resource allocation north of the seventh and eleventh baselines and Indian employment to the Commission.

The tourism industry, on either an individual operator or association basis, has neither the time nor the resources to engage in sustained information detection across the entire range of provincial ministries directly and indirectly affecting its current and future operations. Government has a primary responsibility in this instance, and the Ministry of Tourism and Recreation has an important leadership function to perform, possibly through its public information agencies. The operations of all provincial ministries directly or indirectly impacting on tourism must be thoroughly examined with respect to the need for secrecy and information restriction. The matter reaches far beyond the tourism field to the core of viable democratic government.

Issue 2: Government Responsibility to Facilitate Access to Vital Information

The regionalization of provincial government administration has resulted in a very dispersed body of information at the various headquarters, regional and district levels. Frequently, it can be very costly in time and money to access the documentation associated with a particular problem related to the planning, allocation, development and management of tourism resources.

Government has a responsibility to offset these limitations of access that can be particularly constraining for residents of Ontario North of 50°, especially those living in the remote settlements. Collections of all vital documentation in regional offices, and perhaps some district offices, that are readily available to the public would be useful, but only if they are comprehensive and regularly updated. Some form of information service centre, possibly equipped with an on-line retrieval system, would be helpful. The provision of financial assistance to tourism groups, both native and non-native, so that they can gain access to information is a disputable aspect of this issue, particularly in view of its cost implications. It is clear, however, that the problem requires immediate attention leading to an overall remedial strategy.

CATEGORY B: RELATED TO TOURISM SECTOR INVOLVEMENT IN DECISION-MAKING

Another consequential issue category, around which a number of sub-issues revolve, is that pertaining to the need, and most appropriate structure and process, for the effective participation of the tourism sector in government decision-making related to resource planning, allocation and management. Again, this is a specific expression of a more general issue of effective public participation in government decision-making across the entire social, economic and natural environmental spectrum in Ontario North of 50°.

For tourism, this group of issues has recently received its sharpest focus with regard to the strategic and district land use planning processes of the Ontario Ministry of Natural Resources, the Forest Management Agreements concluded with the forest products industries by that ministry, and the construction of forest access roads funded under the Canada-Ontario Forest Management Subsidiary Agreement. A satisfactory resolution of the issue of access to information is obviously a prerequisite for dealing with this problem. Moreover, the extensive list of issues that follows suggests that a very substantial area of indecision, confusion and, to some degree, hostility could be involved.

Issue 1: The Basic Right and Legitimate Limits of Tourism Sector Involvement

Some regard tourism sector involvement with the decision-making process of government as limited and somewhat peripheral. Others, particularly representatives of the tourism sector, both native and non-native, consider it a basic right of the individual operator or the industry. Moreover, they claim that involvement reaches throughout the entire range of decision-making, including resource management and allocation, planning and development.

Issue 2: The Legitimate Range of Interest Groups that Should be Involved in Ontario North of 50°

A sharp distinction is often made on a geographic basis. Some feel that only northern residents should be involved in the decision-making process. Others claim that the full range of affected interests throughout the province is equally entitled. A further distinction is frequently made between tourist operators with vested financial interests and people with concerns about public park development or environmental conservation and preservation. The fact that government is continuously attempting to strike a reasonable working balance between interest groups does not negate the importance of this issue.

Issue 3: The Desirable Structure and Process for Effective Intervention of Tourism Interests

An enormous range of opinions exists respecting the desirable structure and process required for effective participation by tourism interests in decision-making. Clearly, there is no prescribed solution or set of solutions for this issue. Its resolution requires exploration and experimentation in the general area of public involvement with government decision-making across the entire field of resource planning, management and utilization in Ontario North of 50°. Moreover, the situation is further complicated by the need to involve the local native population with its distinctive set of values and expectations.

Sub-Issue (a): Intermittent as Opposed to Sustained Participation

Involvement on a relatively continuous basis through some form of representation on decision-making bodies, as opposed to periodic consultation in crisis situations, is considered essential by many. In this manner, the tourism industry can become fully apprised of matters affecting it and effectively participate in the decision-making process. Others feel that such demands indicate an inadequate understanding of the processes of government and public administration, and that the concept is not operationally practical.

Sub-Issue (b): Prospective Involvement as Opposed to Retrospective Final Approval Participation

Prospective involvement has the potential to be really effective and satisfying in that the tourism industry would be drawn into decision-making affecting its interests from the inception of concepts, through their assessment stages, to final approval. Retrospective participation is usually restrictive in its impact because the major decisions have often been already taken and the opportunity to influence matters is limited to minor or relatively unimportant aspects. Such participation becomes largely cosmetic in nature. This situation is characteristic of participation by the tourism sector in the strategic and district land use planning of the Ontario Ministry of Natural Resources.

Sub-Issue (c): Peripheral Consultation and Fact-Collecting as Opposed to Critical Participatory Involvement

Frequently, government's approach to the private tourism sector is essentially to seek its assistance or cooperation in factual data and opinion collection for the preparation of reports upon which decision-making will be based. This process cannot be considered effective participatory, prospective involvement in planning or decision-making.

Issue 4: Appropriate Tourism Sector Involvement in Forest Access Road Planning and Approval Processes

The review and approval process adopted by the district offices of the Ministry of Natural Resources for the annual road plan is essentially retrospective and advisory/consultative in nature insofar as interest groups outside the ministry and the forest extraction companies are concerned. All major initial policy and strategy decisions concerning the primacy of land use in an area, general route location and construction timing have been made by the company in consultation with MNR or perhaps provincial grant funding agencies such as the Northern Ontario Resources Transportation Committee. The reactive review process of the tourism sector, either on a group or individual basis, focuses almost entirely upon adjustments in alignment and buffer forest reserves designed to mitigate detrimental impacts. In effect, the major decisions are taken outside the influence of the tourism

sector and reach it essentially as a *fait accompli*, leaving only minor items to be influenced by the review process. A new approach, bringing both the tourism sector administration of the provincial government and the private enterprise operators into the formative stages of the process, is essential.

CATEGORY C: RELATED TO ACCOUNTABILITY

Adequate accountability for decision-making by both government and private enterprise has become a major issue for tourism development in Ontario North of 50°. This is particularly true for government, which is not subject to profit-and-loss accounting. The limits of the requirement and the procedures necessary for the attainment of satisfactory accountability remain at issue.

Issue 1: Accountability of Governments to the Private Tourism Sector for Decision-Making Respecting the Supply, Marketing, Development, and Operating Foundations of the Industry

This issue embodies one of the most serious constraints on attempts by the tourism sector to interface effectively with governments on contentious matters. It is true that governments ultimately are responsible to the electorate for their actions. Even so, a mechanism must be built into the government decision-making system that allows for the ready identification of agencies and individuals responsible for decisions at the political and administrative levels affecting the tourism industry in Ontario North of 50°. Moreover, opportunities must be built into the system to ensure performance evaluation in terms of effectiveness and efficiency and to make the results manifest to the interested public.

Issue 2: Accountability of the Tourism Industry to Governments for the Use of Resources Placed at its Disposal Under Licenses and Permits

For tourism, accountability takes the form of accurate and timely reporting to government of operating aspects, including guest volume and resource harvesting, considered necessary for efficient and effective resource management. Some regard this reporting requirement as an imposition and constraint on their rights and freedom to operate a business. Others accept it as a reasonable requirement that is in the long-range interests of the industry. The problem centres primarily on what can be considered to be a reasonable time and cost demand by government.

Issue 3: Accountability of Native Groups for Financial and Material Assistance Provided for Tourist Facility Planning, Development, Management, and Operation

The apparent unsatisfactory accountability of native people, particularly in group situations, for financial and material assistance

provided for tourist facility planning, development, management and operation is undoubtedly one of the most serious of this group of contentious matters. In the present era of public expenditures, characterized by budget constraints, by demands for stringent expenditure controls and by increasing emphasis upon program and project efficiency and effectiveness, past procedures and practices are no longer tolerated by central budgeting agencies. Funds provided will have to be rigidly applied to stipulated purposes, budget estimates adhered to, and capital structures and equipment regularly inventoried and maintained in good order to the end of normal life expectancy.

CATEGORY D: RELATED TO NATURAL RESOURCE POTENTIALS, ALLOCATION AND MANAGEMENT

Some of the most fundamental and contentious issues related to current and future tourism development across Ontario North of 50°, and the remote northern areas surrounding the native settlements in particular, are associated with this category. This is to be expected since the category reaches directly and significantly to sharply contested differences in basic attitudes, philosophies, interests, and policy outlooks concerning resource ownership, priority user rights, resource use, allocation practices, management procedures, and conforming/non-conforming, compatible/incompatible and single/multiple uses.

Issue 1: The True Strengths and Limitations of the Supply Foundations for Tourism

At issue is the unique character of the geographical foundations for tourism development in Ontario North of 50°, in terms of both the strengths and limitations of the natural resource supply foundations and the opportunities and constraints of the socio-economic fabric of the remote native settlements. Many view the area as a vast storehouse of unexploited angling, hunting and wilderness travel opportunities awaiting development by commercial entrepreneurs in the traditional manner that characterized past development to the south. Others consider the exploitable resources to be limited in scale and variety and discretely distributed in an area transitional between the northern edge of the Boreal forest and the Arctic environment. This resource pattern, together with the dominantly native population in the far northern settlements and its weak and comparatively opportunity-deficient local economic structures, is said to demand a specially tailored approach to tourism planning and development. The simple northward progression of the development patterns and procedures of the south would be considered an economic and social disaster.

Issue 2: Native Priority Right of Access to Resource Potentials in Part of Ontario North of 50°

The priority right of access of the local native population to those natural resource potentials of Ontario North of 50° situated to

the north of the 7th and 11th baselines and the Albany River is an issue of fundamental importance. The basic question is straightforward. Will tourism development opportunities in general, and those for angling, hunting and wilderness travel enterprises in particular, be reserved for native people or will there be unrestricted access to development opportunities for all residents of northern Ontario or the province as a whole? More specifically, the issue is related to the extension and entrenchment of the present limitation on non-resident commercial sport camp development in the northern part of the study area until the district land use planning process of the Ministry of Natural Resources has been completed.

Issue 3: The Importance of Wilderness Environment and the Need for Designation

The importance of wilderness in Ontario North of 50° for the tourism industry is generally recognized, but the designation of such areas and the enforcement of management practices required for the maintenance of their natural attributes are strongly at issue. Moreover, the pattern of interest groups and sub-issues related thereto is complicated. Some state that the immediate designation and protection of vast areas of relatively unspoiled wilderness are a basic requirement for the development and continuance of a viable tourism industry in Ontario North of 50°. Others claim that Ontario North of 50°, outside the urban centres and the remote settlements, is a vast wilderness and that the designation of single-purpose wilderness areas, precluding multiple land use practices that bring important economic returns to the local communities, is a disaster. Furthermore, some tourism entrepreneurs view the creation of specific wilderness areas as a serious threat to their access to the fish and game resources on which their livelihood rests.

Issue 4: The True Extent and Cause of the Deterioration of the Fish and Wildlife Resource Foundations for Tourism

Many claim that there has been serious deterioration of the fish and wildlife populations on which the tourism industry depends. They cite over-harvesting by commercial fishing and by sport camp operators, as opposed to habitat destruction, as the fundamental cause. Others attribute the decline to excessive harvesting by the general public as a result of the opening of forest access roads and major highways. Still others feel that damage to habitat and wilderness, and sometimes their virtual destruction, by logging and mining operations is the basic long-term cause. In contrast, some claim that there has been no appreciable decline and can point to increases in particular game species, as for example, moose in the northern part of the study area.

Sub-Issue (a): The Scientific Validity of the Resource Information Used in Management Decision-Making

The accuracy of the resource information and the calculation procedures used by the Ministry of Natural Resources in the estimation of

fish and game populations and the productive capacity of lakes, rivers, and terrain prior to the granting of land use permits for commercial outpost camps are widely challenged by tourist operators. Many feel that excessively restrictive practices, substantiated on pseudo-scientific grounds, severely curtail the economic viability of their business operations. The biological scientists, while recognizing the limitations of their information base, feel that it is sufficiently diagnostic of problem situations and general carrying capacities.

Issue 5: Mandatory Environmental Impact Assessment for Forest Access Roads

Past exemption from mandatory environmental impact assessment of roads in Forest Management Areas, private non-subsidized company roads, and company roads built and maintained on a cost-share or subsidized basis is a major issue. Moreover, the appropriateness of the impending application of class environmental assessments to forest access roads in Crown Management Units and Forest Management Areas is controversial. The intensity of the issue is heightened by the sudden and unanticipated entrance of access roads into the landscape in force as a result of relatively massive public funding through the Canada-Ontario Forest Management Subsidiary Agreement. The roads are opening up the last frontier area of opportunities for remote Boreal forest hunting and fishing camps. There is no place for the industry to retreat to, and climatic constraints generally prohibit the conversion of present facilities to family resort complexes.

If these roads were made subject to full-scale environmental impact assessment, tourism interests would have access to a formal procedure and public forum through which the economic and social significance of their industry and the impact of roads upon it could be adequately expressed. Alternative route and alignment opportunities could be identified and assessed in terms of a total cost-benefit framework that adequately recognized tourism. Finally, satisfactory construction and operational control procedures could be imposed to minimize detrimental impacts.

Of major importance, tourism, public park and outdoor recreation groups and wildlife and fisheries management interests find common ground in this issue. Tourism should avail itself of every opportunity to strengthen and exploit this base of mutual interest and concern.

Issue 6: Appropriate Management Tools to Control the Detrimental Impacts of Road Construction and Maintenance

For controlling detrimental impacts of road construction and maintenance, a number of problem-solving tools are available to the Ministry of Natural Resources at the district management level. All have been applied at one time or another with differing degrees of success. Included are the concepts of restricted public use, controlled public use, limited time use, and the Affleck Guidelines. The



Plate 1: Access road to Detour Lake gold mine, under construction in 1981. Resource access roads undermine the wilderness attraction of remote outpost camps, such as that situated on Loune Lake, right centre. (Source: Royal Commission on the Northern Environment.)

latter are concerned largely with the limitation of timber harvesting alongside roads, rivers and lakes. This aspect of resource administration is widely at issue.

Under the *Public Lands Act*, an MNR district manager can open and close roads at his discretion. Companies can restrict the use of roads built by them on their leased limits but, increasingly, direct and indirect pressures are applied to open these roads to public use. For example, it is government policy that all roads built with grants or subsidies from MNR, the Northern Ontario Resources Transportation Committee or the Ministry of Northern Affairs must be open to public use. If the roads are open to public use, MNR does not charge private companies for the aggregates that they take from Crown lands for road construction. Since aggregates can be worth a great deal of money, the companies generally agree to public use.

Restricted public access that excludes the use of the roads by local resident sportsmen and tourists, coupled with the maintenance of adequate aesthetic forest reserves on their flanks, is clearly the optimum solution for the continuation of a viable tourism and outpost camp industry. It is equally clear that this is unacceptable to the local population and, hence, politically unpalatable. Nevertheless, it is important to note the nature and scale of the alternatives involved in the trade-offs in this instance, one of which could very conceivably entail the total or partial collapse of the remote sport camp industry in many parts of northern Ontario.

Controlled access, particularly restricted use at critical spawning or mammal reproduction periods, probably represents the minimal strategy tool that must be employed if the quality of the resource base is to be reasonably maintained, something obviously in the interests of both the commercial camp operators and the local angling population. It is probable that this communality of interests will make the controlled access tool the most acceptable of the group.

Under the limited time-use concept, forest access roads are destroyed (rendered impassable) once the area has been harvested and the subsequent silvicultural work completed. In this case, differences of opinion centre on the length of time to be allowed for reforestation work which, if excessively long, would expose high quality angling resources to virtual annihilation, and on the length of the roadbed to be destroyed. After the public has used a road for a considerable period of time, political pressures to keep it open indefinitely are often extremely strong. In some cases, commercial tourist operations may develop on the basis of the access provided, particularly the family vacation cabin type of facility that does not require the attraction of premium quality angling and hunting opportunities in order to be a viable operation.

In 1981, a sub-committee, composed of six staff members of MNR and reporting to the Northern Ontario Resources Transportation Committee, produced a set of operating guidelines for MNR's field staff in northern Ontario to use in the approval of the location of access roads so as to minimize their impact on outpost camp operations. These are referred to as the Affleck Guidelines after the chairman of the sub-committee. In addition, the sub-committee was to examine existing instructions related to forest reservations along shorelines and roads and to produce another set of operating guidelines that would optimize landscape aesthetics but minimize the loss of merchantable timber volumes. The results of both mandates of the sub-committee are of vital consequence to tourism.

Issue 7: The Equitable Allocation of Costs for Environmental Quality Maintenance and Rehabilitation

The equitable allocation of costs between industrial resource users, including the tourism sector, and society as a whole for natural resource quality maintenance, rehabilitation and enhancement is constantly at issue. Actually, two approaches to this problem appear to

be concurrently in use in Ontario. The societal approach, in which government assumes financial responsibility, is justified on the grounds that benefits accrue to society as a whole in the form of income and employment generated by industrial users, taxes derived from individual and corporate profits, and generally lower product costs to the consumer. Alternatively, allocation of costs can be treated as a corporate problem in which the industrial user pays, particularly in the case of water and air pollution.

Both approaches carry important implications for the tourism industry, particularly its natural resource-based angling, hunting and wilderness travel component. The adoption of a societal approach is considered by many to justify non-restricted public access to natural fish and game resources within constraints imposed by regulations designed to ensure the natural replenishment of stocks in perpetuity. The assumption of costs by industry might be interpreted by some as establishing a degree of proprietary rights, or priority of use, that could be detrimental to the tourism industry in some situations.

Issue 8: The Need for the Creation of Tourism Management Areas (TMA's)

The creation of Tourism Management Areas (TMA's) in those parts of Ontario North of 50° possessing outstanding natural resource potentials for tourism represents a solution to problems of management. The creation of units or areas of this type in the study area may soon surface as an issue. They could provide an effective counter-balance to the current placement of the tourism industry in a subservient position to the forest products industry over vast areas of northern Ontario as a result of the establishment of Forest Management Areas (FMA's). There would appear to be enormous possibilities associated with this concept if a local tourist operators' association were established to create an administrative focus around which government and the industry could interact. The concept's introduction into the remote northern portions of the study area requires immediate and serious consideration. An Indian tourist operators' association, discussed later in this report, could probably provide the required focal administrative structure for the development of the TMA concept in most or all of the remote northern locations in Ontario North of 50°. In the southern portion of the study area, local associations in existence or specially created for these purposes would provide the administrative requirement.

In a Tourism Management Area, resource allocation and management plans would be formulated to ensure tourist operators the degree of security of resource supply required for medium- and long-term investment decision-making. Financial support and cost-sharing arrangements could be evolved between government and the tourism industry as have been developed between the forest products industry and government in the case of the Forest Management Areas, although the dollar requirements would not be on such a large scale. Forest harvesting, trapping and commercial fishing would not necessarily be excluded from any TMA, but these activities would be subservient to the interests of tourism.

In many respects, creation of the TMA simply implies the extension of the FMA concept to the tourism sector, especially in the undeveloped northern reaches of Ontario North of 50°.

CATEGORY E: RELATED TO HERITAGE RESOURCES AND TOURISM

Some of the more significant issues related to heritage resource preservation and development are associated with their tourism aspects. While it is generally recognized that there are important mutual benefits to both fields arising from recent interactions, some fundamental issues are present. Fortunately, the appreciation of archaeologists for the spin-off benefits from tourism has increased in recent years and real progress has been made towards the adoption of practical, beneficial positions on both sides. Recognizing tourist appeal and local interest, archaeologists have opened their excavations to public viewing and have explained the value of their work to interested groups. Sport camp operators in remote areas now regularly report pictograph finds and instruct their guests with respect to their significance and fragility. The need to treat heritage resources with care is stressed.

Issue 1: The Compatibility of Tourism and Heritage Resource Interests

Many contend that excessive emphasis on tourism opportunities and benefits often thwarts, distorts, or disrupts the introduction and continuation of the proper balance of programs and projects in the heritage field *per se*. Some feel that excessive focus on tourism benefits results in too high a percentage of limited financial resources being devoted to massive projects such as Fort William, leaving inadequate funds for smaller, scattered developments of local importance and for the less spectacular but essential identification and preservation of remote assets such as Gloucester House or Fort Churchill/Nieu Savanne. To a degree, the emphasis on the development of the fur trade heritage resources at Moose Factory, the destination of the Polar Bear Express, compared with other historic and archaeological resources in other parts of Ontario North of 50°, is a case in point.

Issue 2: The Final Disposition of Artifacts and the Reporting of Survey Results

The final disposition of discovered artifacts and the method of reporting the findings to local residents have become an issue of consequence that has examples in Ontario North of 50°. Frequently, the materials collected are shipped to universities and museums in central urban areas for further research and for ultimate storage and display in surroundings safe from fire and deterioration and available for viewing by large numbers of people. A contending point of view maintains that the artifacts should be retained in the location where they

are found so that they may make their maximum contribution to the development of local identity and to the supply foundation for tourism with its attendant beneficial economic impacts.

Issue 3: Native People's Acceptance of and Involvement in Archaeological Research

Native people's attitudes towards, and opportunities for involvement in, archaeological research in general and the exploitation of the associated spin-off benefits of tourism are an important basic issue. The native population has voiced strong objections on a number of occasions to archaeological investigations of burial grounds, particularly when human remains and artifacts are removed for examination and storage elsewhere. Frequently, it has had limited control of, or meaningful involvement in, the reconstruction, preservation or interpretation activities and associated tourism development. The recent agreement between Parks Canada and Manitou Rapids Indian Band near Emo with respect to the Manitou Burial Mounds, a National Historic Site, represents a significant achievement towards resolving many of the aforementioned issues. Under these arrangements, the native people have been placed in a central position with respect to research and development funded by Parks Canada, receiving access to labouring, custodial and interpretive jobs on a permanent basis. They have been caretakers of the site for seven years and have helped in excavations for four years. The interpretation centre is also staffed by the Band and opportunities are available to reap the economic tourism spin-off benefits. This arrangement may represent a highly satisfactory model for Indian heritage development in Ontario North of 50°. Agreements whereby native people are trained for archaeological research and possible development and operation of tourism potentials related thereto could go a long way towards the resolution of this issue.

Issue 4: Marking of Sites that Cannot be Adequately Supervised

There is considerable difference of opinion with respect to the marking and interpretation of isolated historic sites that cannot be adequately supervised. While a contribution to the marketing and enjoyment of wilderness travel would result, there is a great risk that the sites would be pillaged or ruined by inconsiderate or unthinking tourists and vandals.

CATEGORY F: RELATED TO MARKETING

There are a number of issues related to marketing that have not generated particular controversy. Nevertheless, they are significant and are likely to assume increasing importance in the near future.

Issue 1: Recognition Accorded to Ontario North of 50°, Particularly to Sport Camp Operations, in Government Advertising and Promotional Activities

Some feel that Ontario North of 50° in general, and its sport camp operations in particular, do not receive adequate attention in government advertising and promotional activities for tourism when compared with other parts of the province. Government authorities faced with declining budgets and a need to direct efforts towards major "pay-off" markets feel that the area receives adequate attention, considering the scale of its facilities and the value of its tourism economy to the province and the nation. In effect, the issues centre around the degree of effort that can, or should, be expended towards the development of an emerging tourism economy as opposed to expenditures directed towards the well-established areas of high economic benefit that must continue to be adequately promoted and advertised in a strongly competitive market.

Issue 2: Importance of Foreign Offshore Markets

Some government officials and tourist operators regard foreign offshore areas, particularly West Germany, Italy and Japan, as offering the major future market opportunities for the development of profitable, high-quality sport camp enterprises in Ontario North of 50°. They feel that a major co-ordinated marketing drive involving the federal and provincial governments, the international air carriers and the private camp operators, including native-operators, should be initiated. There is substantial reluctance by government, however, to promote these northern Ontario areas, and native-operated facilities in particular, in foreign markets. In this case, it is felt that the present quality and reliability of much of the product could prejudice the substantive advertising and promotion investment by the federal and provincial governments in these markets. In effect, a succession of bad experiences at camps could sour the travel trade against Ontario or Canada as a whole. Others state that the major market will continue to be solidly based in the United States, with a growing southern Ontario component. They consider that the offshore foreign market will remain insignificant overall, while demanding a level of effort that is not worth the cost.

Issue 3: The Extent of Government Financial Assistance to Private Entrepreneurs on an Individual or Group Basis for Direct Advertising and Promotion

Government has become increasingly involved in financial assistance to tourism entrepreneurs or their associations, in northern Ontario especially with native camp operators, to defray the costs or increase the impact of promotional activities at sport shows in Ontario and the United States. Some urge continued and expanded efforts in this direction, while government is moving rapidly towards a termination of this assistance, regarding previous efforts simply as catalytic or seed money.

Issue 4: Individual versus Group Marketing for Native-Operated Facilities

Many native operators prefer to continue to market their product individually, either indirectly through arrangements with charter air carriers and marketing agents or by direct sale to the sportsman. Others feel that the marketing of native-operated camps in Ontario North of 50° could best be achieved through a central native tourist or sport camp operators' association that could reduce costs and project an image of reliability and strength in the market place, something of major importance in attempts to penetrate the offshore foreign markets. The attainment of a general consensus on the future of unified marketing arrangements for the native-operated camps seems desirable.

Issue 5: The Use of Wholesale and Retail Agents

Many operators feel that direct marketing is preferable to the use of agents since it circumvents the payment of commissions and offers the possibility of business travel outside the region. Others maintain that the industry must learn to utilize the travel marketing structure, particularly if it hopes to penetrate foreign offshore markets to any extent.

Issue 6: The Level of Tariffs

Some feel that the fish and game hunting market is fairly inelastic, which is to say that price increases will not bring a proportional decrease in consumer purchasing. The supply foundations of the industry are considered to be unique and sufficiently attractive to create a sellers' market. Demand is considered to be reasonably stable in times of economic recession so that increased operating costs can be passed on to the consumer in the form of increased tariffs. Others see the market as highly competitive in nature and subject to considerable buyer resistance to increasing tariffs. Comparable quality fishing and hunting opportunities are said to be available in a number of areas in Canada and elsewhere so that time and cost factors exert a major impact on consumer choice. Some feel that Indian goose hunting camps may be nearing tariff limits at the present time, particularly those with high transport costs in far northern locations.

Issue 7: The Significance of Service

Many contend that service is the basic differentiating factor in the sport camp tourism industry in Ontario North of 50°, in which a common and fairly consistent product is sold, namely fish and game. Service is said to make the difference in the marketing success of an enterprise so dependent on repeat business. Moreover, the level of service is the key to success in the potential lucrative offshore markets. Others contend that the market can support only a modest level of services beyond which it is disastrous to reach. Friendly,

personal services involving no substantial cost are considered desirable, but investment in elaborate plant requiring substantially higher tariffs is a disaster. The issue has important implications for the preparation of investment strategies for the study area.

Issue 8: Continued Financial Support for the Polar Bear Express

This issue centres around continuing financial assistance by the Ministry of Northern Affairs for the operations of the Polar Bear Express and for a substantial portion of the tourist attractions in the destination area. Starting as a short-term financial aid program to enhance and enrich the tourist experience of the train excursion, which had declined markedly in ridership, the assistance is assuming the dimensions of a permanent operating grant. Moreover, substantial precedent-forming attributes could be associated with this action, as evidenced by recent aid for the Agawa Canyon run of the Algoma Central Railway. Could, or should, this support precedent for a rail excursion considered critical to the development of tourism in a particular region be extended to cruise boats or bus excursions in other parts of the province? If tourism is a viable business and an economically beneficial activity in this part of Ontario North of 50°, at what point should the private sector be expected to assume full responsibility for all costs associated with the operation? Does the Polar Bear Express represent a special form of tourism infrastructure for which continuous provincial government financial support can be justified? If so, what is the rationale and what are the terms for the future dispensation of grants?

CATEGORY G: RELATED TO ECONOMIC SIGNIFICANCE

A number of important issues reach directly and critically to the cost-benefit equation for public investment in the tourism sector in Ontario North of 50° and, in particular, its remote northern native settlements. Many feel that the economic issues noted subsequently are largely responsible for a substantial proportion of the difficulties that the tourism industry confronts in its interactions with government.

Issue 1: The True Scale of Current and Future Investment, Employment and Income Impacts of Tourism in Ontario North of 50°

The true scale of the direct, indirect and induced economic impacts of tourism in Ontario North of 50° is in dispute, due in considerable degree to a combination of inadequate empirical evidence and a frequently imprecise and confusing use of concepts and terminology. Often, statements of employment impact are based on limited factual evidence, fail to distinguish between full-time and part-time jobs and give no indication of man-years of work. While wage estimates are usually reasonably accurate, management and owner salaries and profits are often blurred. The all-important adjustments in profits for

transfer payments or reinvestment within the area usually remain unrecognized, and invariably unquantified. Indirect impacts generated by the inter-industry demand for finished and semi-finished goods at the final demand point are usually ignored, largely because they have a high leakage factor in northern economies. Induced impacts generated by the local re-spending of wages, salaries and profits, the so-called household or personal spending multiplier effects, are often overestimated. This confusion obviously represents fertile ground for the growth of contentious issues.

Issue 2: The Relative Importance of Tourism in the Total Economy

At one end of a continuum of claims, the industry is regarded as a mainstay of the economy of northern Ontario and at times almost as a panacea for the severely depressed and opportunity-constrained economies of the native settlements in Ontario North of 50°. At the other end of the scale, tourism is felt to be limited in its local economic impact and characterized by short-term and low-wage employment opportunities. A large percentage of the benefits accrue to extra-regional air carriers, highway service centres and the wholesale and retail travel marketing agents. Attempts to accommodate tourism sector needs for natural resources are said to impose costs out of proportion to the beneficial economic impacts to government and local communities.

Clearly, the truth lies somewhere between these extremes, with substantial differences from area to area and enterprise to enterprise. Within the context of remote northern native settlements that have limited alternative economic opportunities and a resident population displaying a pattern of multiple-source employment and income, including trapping and commercial fishing, tourism development can assume a significance far greater than is suggested by the absolute dollar values involved. The outlook over the long haul will depend largely upon the ability to contain leakage from the local economy.

Sub-Issue (a): Comparison of Economic Values of Tourism and Forestry

The substantial economic impacts generated by the forest products industry are considered by some to be adequate justification for its dominance over tourism in resource management and allocation conflicts. Others state that comparison of these economic sectors on the basis of product value and income and employment generated is unrealistic, biased and misleading. In some areas, particularly in the remote northern portions of Ontario North of 50°, forestry opportunities are limited. It is also noted that the forest industry has been able to externalize many of its costs for road construction, environmental maintenance and forest regeneration. In effect, these costs have been passed on to the public sector through grants, subsidies and tolerance of pollution and other forms of environmental impairment. When these costs are considered, the economic benefit equation for the forest

industry compared with that of tourism is much less decisive. In addition, it is claimed that the potential economic value of the tourism sector is not achieved for a number of reasons. Tariffs charged by many camp operators result in the sale of fish and wildlife resources at far below their true economic value. Some attribute this to the failure of the industry to market its product aggressively in newly developing market areas such as Germany or Japan, or in the professional and senior management sectors of the existing market willing to pay higher prices. Equally important, the higher priced and more profitable sophisticated plant and services that the quality of the fish and game resources can support is not provided by the operators. The focus is said to be upon minimal investment in facilities and services to reduce prices to the level of the blue collar market of the United States and southern Ontario.

Issue 3: Recognition of the True Economic Value of Fish and Wildlife Resources

Many contend that the fish and wildlife resources are disposed of by government resource management and allocation procedures and the marketing practices of the sport camp operators at far below their true economic values. This is said to result in a substantial reduction in potential beneficial economic impacts. Others feel that patterns are reasonably well adjusted to market realities and the total spectrum of competing demands for resources. The full dimensions of the situation are revealed in the sub-issues that follow.

Sub-Issue (a): Inadequate Recognition by Government of the Greater Economic Impact Resulting from the Allocation of Fish Resources to Angling rather than to Commercial Fishing

Many claim that fish supply allocated to commercial fishing brings far less economic benefit to a community than its utilization for commercial sport camp operations. This is said to be the case particularly in Ontario North of 50°. Others feel that there is room for both economic activities.

Sub-Issue (b): Treatment of High Quality and High Value Fish and Game Resources as a Free Good

Social considerations are said to take precedence over economic in that free public access to fish and game resources, particularly by northern residents, is accorded priority over the reservation of high quality areas for sport camp operators. Without the latter, the business viability and beneficial economic impacts of sport camps cannot be maintained. Through this policy, the resources are disposed of at far below their true economic value. In a sense, a method is thereby provided for residents and non-residents alike to circumvent the true price structure and economic value of the fish and game resources.

Sub-Issue (c): The Price Level at which Sport Camp Operators Market Fish and Wildlife Resources

Some feel that the price level is attuned to market conditions and the quality of the angling and hunting opportunities available. This view is frequently expressed with regard to commercial operations in highway-accessible locations in Ontario North of 50°, especially with the advance of the network of forest access roads that are open to the general public. Moreover, it is stated that the availability of equal, or in some cases superior, alternative opportunities in other parts of Canada, in North America or offshore imposes constraints on the tariff structure. Others express the opinion that the sport hunting and fishing opportunities are sold at prices far below their true market value, particularly in remote fly-in locations. It is contended that there is an opportunity to develop and market much higher-priced, luxury-type, remote lodge operations that will substantially increase profit levels and local employment and income on a sustained basis.

Issue 4: The True Cost/Benefit Relationship of Park and Wilderness Areas in Ontario North of 50°

Timber, pulp and paper, sport camp, and mining interests claim that substantial current and future investment, income and employment opportunities are wiped out by a decision to establish provincial park and wilderness areas. Others contend that wilderness is an indispensable element in the supply foundations of the tourism industry and a basic requirement of a complete system of public environmental capital assets.

Many demand solid economic studies to determine the range of benefits and costs involved. The absence of such studies in the strategic land use plans of the Ministry of Natural Resources gave rise to demands for studies of this type for the recommended (and now created) Whitewater Wilderness Park. Several key questions must be answered in any studies of this type. What is the value of the resources in the proposed wilderness area and the current investment in their development? What is the value of the portion that will be given up? What economic benefits will be generated by wilderness designation?

Issue 5: The Desirability and Practicality of Government Regulations Designed to Increase Local Economic Impacts of Tourism

Free access of residents and non-residents to the angling, hunting and wilderness travel activities on Crown lands in northern Ontario, including Ontario North of 50°, is at issue. Many non-resident tourists, disparagingly referred to as "pork and beaners", travel north in self-contained trucks and camper units that enable them to exploit the superb outdoor recreation opportunities of the region while circumventing the local business and economic structure. In this manner, valuable and limited natural resource potentials are "sold" far below their true market value. Moreover, the competition for resources and the



Plate 2: Sport fishing, Albany River. (Source: Ministry of Tourism and Recreation.)

pressures placed on them can undermine the viability of commercial sport camp operations, particularly when the remote wilderness attractiveness is destroyed by a seemingly unlimited influx of anglers and hunters along roads newly opened for forestry operations. Wilderness canoeists travel north on rivers from headwater areas to tidewater without Indian guides, something that was not permitted in earlier years. Many feel that regulations requiring non-residents to use commercial accommodations in the area, possibly to stay at commercial sport camps in some places and to hire guides for river travel, are necessary. Others feel that such regulations, particularly as they relate to Ontario residents, are undesirable.

In recent months, steps have been taken to force sportsmen coming into some parts of the area in self-contained units to camp in commercial campgrounds or to use commercial accommodations. Many consider this to be only an initial step in the resolution of this issue.

CATEGORY H: RELATED TO TOURISM PLANNING AND DEVELOPMENT

A number of important issues related to planning were identified in the course of investigations associated with the preparation of this report.

Issue 1: The Need for Comprehensive Planning

The need for a comprehensive planning approach to the development of tourism potentials in Ontario North of 50° in general, and that part to the north of the 7th and 11th baselines and the Albany River in particular, is at issue. Some contend that development should be allowed to proceed as in the past, with direction and control provided by the Ministry of Natural Resources' grant procedures for land use permits for sport camp developments, lake and habitat supply investigations, and general guidelines presented in the strategic and district land use plans. Others claim that a comprehensive, co-ordinated planning effort for tourism, involving concerned local residents and all federal and provincial government agencies with major responsibilities in the field, is a prerequisite for attainment of maximum social and economic benefits and maintenance of the supply foundations.

Issue 2: Agency Responsibilities for Comprehensive Planning

There is disagreement between administrative agencies with respect to responsibilities for tourism planning in Ontario North of 50°. In the strategic and district land use planning of the Ministry of Natural Resources, tourism received only peripheral treatment, the Ministry taking the position that planning for the sector is the responsibility of the Ministry of Tourism and Recreation. MNR considered its role to be limited primarily to maintenance of the quality of the natural supply foundations and their orderly allocation to a variety of competing users, among them tourism. Clearly, the Ministry of Tourism and Recreation has both the responsibility and the mandate for planning. Moreover, it has sponsored research and planning studies for tourism in northern Ontario in the past.

The federal Department of Indian Affairs and Northern Development has a responsibility insofar as development of the opportunities by Indians is concerned. The provincial Ministry of Northern Affairs also appears to have some interests in an overall policy directional sense, and possibly in relation to some aspects of funding.

Issue 3: Local Control of the Planning Process in Remote Ontario North of 50°

Local control of the planning process in the remote northern parts of Ontario North of 50° is a major issue with the native people. In effect, there is a demand that tourism development be introduced on

their terms with respect to timing, scale, sophistication, management and operation rather than in response to the concepts of southern, non-resident planners. In effect, the plan must originate from within the region rather than from without and it must provide a means for native control of and involvement in basic data collection and analysis, plan formulation and ultimate plan approval.

Issue 4: The Most Desirable Form and Scale of Tourist Facility Development for Ontario North of 50° and Its Major Component Divisions to the North and South of the Albany River and the 7th and 11th Baselines

Some, including people in both the industry and the provincial Ministry of Tourism and Recreation, advocate relatively large-scale, luxury-type facilities that it is felt would be more attuned to future market opportunities and requirements, would generate a level of profit more in keeping with the high quality and true monetary value of the resource potentials, and would exert the highest, sustained local employment and income impact. Substantial investment is considered mandatory, to be supported by sophisticated planning, development and marketing procedures making full use of wholesalers, retailers and carriers and requiring complex operational practices. Attractive resource allocation practices offering long-term security of tenure, making fish and wildlife resources available on a substantial and sustainable scale, and providing for exclusive use of remote areas are prerequisites.

In contrast, others state that small-scale, craft-type tourist facilities, requiring modest capital investment, making use of local materials, and requiring limited management and operational skills, are most desirable and suitable for native people. Moreover, such small-scale facilities are more in harmony with market realities, resource potentials and local investment strengths, and generate greater employment and income impact. In addition, small-scale facilities are felt to offer a more suitable range of entrance opportunities for the non-native population with modest investment capital and limited management skills.

This issue is a crucial one for future tourist facility planning and development in Ontario North of 50°. Many are convinced that an industrial type of tourism, characterized by complex marketing and management arrangements, would remove control of tourism development from the local native population to outside interests, reducing native people to virtually labourer status. A craft type of development, requiring a level of planning, marketing and operational capabilities within the range of the current level of local native entrepreneurial skills or attainable within a relatively short training period, is felt to be more desirable.

Issue 5: The Nature and Status of the Planning Efforts of the Ministry of Natural Resources

The true nature and status of the Strategic Land Use, District Land Use and West Patricia Land Use Plans of the Ministry of Natural Resources are at issue, and the matter is crucial to the future of the tourism industry in Ontario North of 50°. Should the output of these massive and highly publicized planning efforts be regarded simply as a broad statement of resource development potentials intended to function as a general guideline for strategy and policy with respect to land and water resource management and allocation at the regional and district administrative levels of the Ministry? Interpreted within another perspective, the output of the process might be considered a "plan of sorts" in which the tourism industry is placed hopelessly at the mercy of the demands of the competing forest products industry. In multiple or sequential resource use, tourism ranks low in priority. The primary beneficiary targets appear to be the forest products industry, the mining industry, and the local population's outdoor recreation needs for angling and hunting. The situation is particularly contentious and alarming when the tourism industry can see no way to come to grips with the "monster", in order to effect changes in the immediate or medium-range future. In effect, these planning processes of MNR have generated an atmosphere of confusion and uncertainty in the tourism sector that requires immediate attention if the situation is not to deteriorate into an atmosphere of recrimination and, perhaps, hostility.

During 1983, four large wilderness parks were created in Ontario North of 50°. It is encouraging for tourism that the industry is recognized as a legitimate land use within the parks, subject to conditions stipulated by the Ministry.

PART TWO

POLICY OPTIONS

PART TWO

POLICY OPTIONS

UNDERLYING PRINCIPLES

CONCEPTS AND TERMINOLOGY

The field of policy definition and articulation is one of the most confused in the entire area of public administration and planning. The policy framework of a government agency or a private company is rarely set forth in an explicit, orderly manner in a single document available for convenient examination. Frequently, goals and objectives must be assembled or implied from legislation, regulations and ministerial announcements. Moreover, available statements of implemental strategy indicating direction, substance, priority and operating principles are often hopelessly intermixed. Finally, there is a marked tendency to express goals in terms of general "motherhood" statements lacking real objectivity and operational definition.

In this report, *policy* is defined pragmatically as a set of integrated goal, objective and implemental strategy statements respecting tourism development and operation in Ontario North of 50° for which a consensus has been reached at a particular point in time by government and/or the private sector. Policy provides the substantive frame of reference necessary for consistent decision-making with a minimum of effort in similar recurring situations. Furthermore, it is a guide to the determination of the appropriateness of a particular decision. Chart 2 defines the components of policy.

A *goal* is defined as a general statement embodying values and aims towards which government or private enterprise is working to affirm or attain. For example, a statement to the effect that government seeks to maximize investment, employment and income opportunities in Ontario North of 50° through the development of tourism is a goal.

An *objective* is a quantitative statement of desired ends having content, temporal and spatial specificity. The efficiency or effectiveness of administrative performance is measurable in this case. A statement to the effect that the government seeks to create 1000 additional seasonal jobs in the tourism industry in Ontario North of 50° by 1990 is an objective.

Eastern Part of Ontario North of 50°

In the eastern part of Ontario North of 50°, non-Indian owned and operated base and outpost facilities are located well to the south of the 7th baseline. Moreover, there are none in the MNR Districts of Hearst and Kapuskasing.

In the southeastern corner of Ontario North of 50° forming the northern part of Cochrane District, 16 outpost camps are owned and operated by three outfitters based on Lillabelle Lake and are situated well to the south of the 7th baseline. Included in the group of operators and camps are Cochrane Air Services (J. Veverka), seven outpost camps; Rogerson Enterprises (D. Rogerson), four outpost camps; and Polar Bear Camps (S. Konopelky), five outpost camps. In all cases these camps constitute only a minor portion of the total number of outposts operated by the outfitters: Cochrane Air Services, 16 per cent, Rogerson Enterprises, 18 per cent; and Polar Bear Camps, 17 per cent. Percentage values for guest capacity are comparable. Polar Bear Camps has a two-cabin base camp at Lillabelle Lake to accommodate guests in transit to and from the outpost camps who may experience delays due to poor weather conditions. The other operators use local hotels and motels for these purposes.

In the Kapuskasing District, base and outpost sport camp development is focused primarily to the south of Highway 11 and can be considered weak when compared with that of other districts in northern Ontario. There are no Indian owned and operated facilities in the district and only two outpost facilities in the area North of 50°, both of which are owned by Hearst Air Services and located south of the 7th baseline. Their tent frame hunting camp on Martison Lake has a four-person capacity as has the single cabin outpost on McLeister Lake formerly operated by Frontier Air Services.

There is no substantial pressure by Indians or others in this administrative district to open new sport camps North of 50°. Suitable angling lakes are few in number and a river sport fishery is difficult to pursue because low water levels in summer make it difficult to land aircraft. The moose hunting opportunities are limited and needed for domestic Indian food supply. The woodland caribou in the northeastern part of the district cannot be hunted by sportsmen and offer no opportunities of consequence for viewing.

In Hearst District, there are no base or outpost sport camps in Ontario North of 50° and only one north of Highway 11. However, some land use permits issued for trapping cabins in the northern part of the district may have a little associated commercial hunting and angling sport camp activity on an intermittent basis.

In MNR's Wildlife Management Unit 23, which coincides with Hearst District, the moose population is substantial. Hearst is often referred to as the "Moose Capital of the World", although opportunities

CHART 2

DEFINITION OF COMPONENTS OF POLICY

Component	Definition
<u>Goal</u>	A qualitative statement of desired ends or values to be achieved, frequently general in nature.
<u>Objective</u>	A quantitative statement of desired ends having content, temporal and spatial specificity. An objective is therefore performance measurable.
<u>Implemental Strategy</u>	<p>A statement defining how goals and objectives will be achieved and consisting of:</p> <ul style="list-style-type: none"> - Statements of Operating Principles; - Statements of Direction/Substance defined by sub-strategies and/or component program elements; - Statements of Priority.

An *implemental strategy*, with its associated statements of operating principles, direction/substance and priority, is a critical component of the framework of policy options presented in this report, for it indicates how goals and objectives will be achieved. Operating principles represent a set of guidelines indicating the manner in which actions are to be undertaken, particularly in relation to human and natural environmental interaction. Statements to the effect that all tourism development plans must be submitted to the local native communities affected or that tourist facility development must be subjected to environmental impact assessment would represent operating principles. In this study, operating principles receive considerable attention since they flow directly from, or are vitally related to, many of the more contentious issues. Secondly, they invariably assume major importance in situations involving an interface of differing cultures such as that prevailing in the study area. Statements of direction/substance define the general approach to be adopted in the attainment of stipulated goals and objectives, in the nature of the ultimate tourist plant desired and in the supporting development,

marketing and environmental supply substrategies and programs. Statements of priority indicate relative importance, emphasis and timing. They provide a basis for the selection and ordering of the substantive program elements and have enormous practical value for budget planning. This is particularly true in the atmosphere of financial constraint that now prevails.

GENERAL APPROACH TO OPTIONS

This report identifies and presents the main options associated with the aforementioned components of policy in an organized manner that will facilitate co-ordinated and consistent decision-making. No attempt is made to be exhaustive in the presentation of alternative points of view and their associated advantages and disadvantages. Variations in the length of the discussion largely reflect the importance of the option as indicated by its direct relationship to issues and the existence of real or viable choices.

While an attempt has been made to indicate the full range of the subject matter of policy options and the interest groups involved, it was necessary to reduce the discussion to a manageable scale. In this respect, the focus of the work of the Royal Commission on the Northern Environment and the current status of the tourism industry relative to development problems and issues were adopted as guidelines. In practice, an elimination process was regularly and consistently employed to establish a focus. In every case, the nature and "cost" of the choice are clearly evident.

The concept of the basic option requires brief comment. In many situations, as for example in planning, a negative decision with respect to the need for, or the desirability to proceed with, an option determines the relevance of the more detailed options that follow. In effect, these detailed options are relevant only if a positive decision is assumed respecting the initial option. In this sense, the initial decision may be termed basic. Those options that follow indicate the nature and complexity of the basic option to a considerable extent.

SELECTION OF A CONSTITUENCY FOCUS

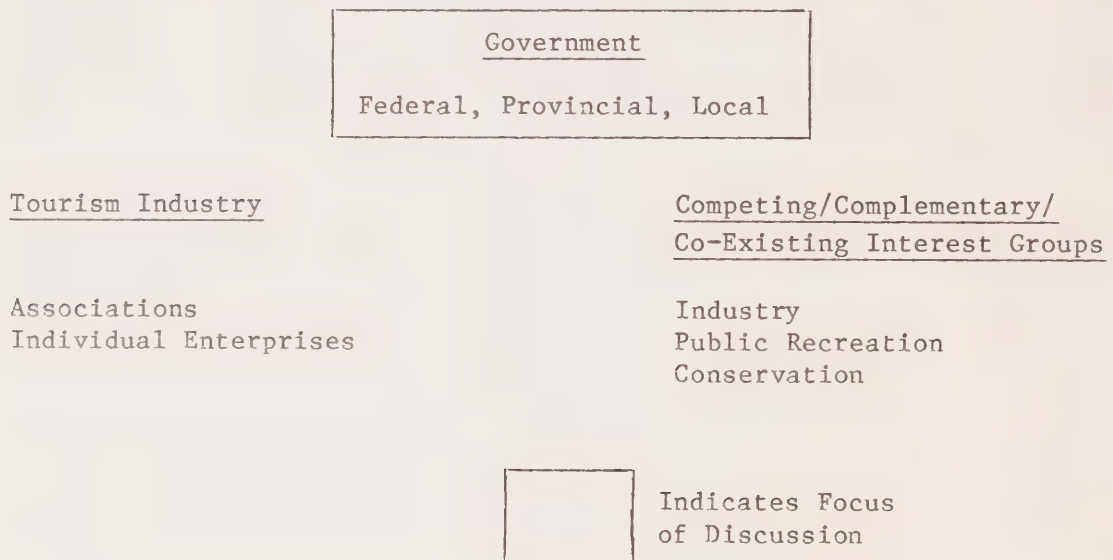
Initially, it is essential to identify the major constituencies or interest groups having a legitimate role in the total field of policy formulation for tourism in Ontario North of 50° (Chart 3). Included are the tourism industry (considered on an economic sector level or an individual enterprise level), competing, complementary or co-existing public and private social and economic interests, and government.

For each constituency, the realistic or viable policy options (including goals, objectives and implemental strategies) are distinct in terms of both content and impact. At the same time, vital elements of interrelationship and interdependence are present. The future success of the tourism industry in Ontario North of 50° is predicated on the identification of the full range of policy options and the

selection and melding of viable alternatives into a comprehensive, harmonious and mutually supportive structure. Much more is involved than the simple preparation of physical development plans. Intelligent, informed and co-operative interaction between the various interest groups on a sustained basis is essential.

CHART 3

GENERAL CONSTITUENCIES RELATIVE TO POLICY FORMULATION



The tourism industry seeks to promote and attain a framework of government policies and public support that will maximize investment opportunities, profits, owner/management income and resale values. To this end, it seeks to attain favourable government actions related to preservation, enhancement and allocation of the natural resources that represent the supply foundations of the industry in Ontario North of 50°. Government lending and taxation policies, supporting advertising and promotion programs, and regulatory and supervisory activities designed to maintain standards, public safety and fair employment practices are critical matters for the industry.

The competing/complementary/co-existing interest group includes industries such as mining, forestry or commercial fishing having competing demands for natural resources. The multiplicity of associations and interest groups wishing to ensure that tourism does not thwart the necessary reservation and management of public areas for outdoor recreation and conservation is also involved. Interestingly, there is a considerable element of mutual interest and complementarity between the tourism sector and these interest groups that has not yet been fully appreciated and effectively exploited. This constituency, which is

both public and private in nature, possesses special characteristics in Ontario North of 50° that are less evident in other parts of the province. Many of the public recreation and resource associations are not resident in the general, the regional or the local area. The National and Provincial Parks Association of Canada and the Conservation Council of Ontario, with their main body of support in southern Ontario, are excellent examples. Secondly, in the more remote northern part of Ontario North of 50°, the fact that the constituency is overwhelmingly native has direct and consequential implications, both socially and economically. This segment of the constituency has been weak organizationally but is rapidly strengthening.

The third constituency includes government at the federal, provincial and local municipal levels and the Indian government structures. In relation to the tourism industry, government roles are custodial, arbitratative and stimulative and are designed to maximize individual opportunities, maintain options and protect public interests. In the socio-economic sense, governments' focus is on the generation of tax revenues, income and employment opportunities and the general improvement of the standard of living through tourism development. In the environmental sense, governments' concern centres on the maintenance, enhancement and equitable allocation of the supply foundations of the industry among competing demands. Socially, policy formulation is directed towards fair employment practices, protection of consumer interests, and the general impact of the industry on the social fabric of the region. The latter aspect is of greater than usual significance in the remote sections of Ontario North of 50°.

The discussion of policy options could be effectively organized around or within a frame of reference primarily centred on any of the three constituencies, government, the tourism industry, or the competing/complementary/co-existing public and private interest groups. For purposes of this study, it was considered most appropriate to organize the approach to policy options according to the government interest frame of reference. Within this primary orientation, a tourism industry perspective is introduced at points where the opportunity is present.

RECOGNITION OF DISTINCTIVE REGIONAL GEOGRAPHIC FOUNDATIONS

Broad Socio-Economic Divisions

The identification, understanding and accommodation of the natural and cultural environments of Ontario North of 50° are critical prerequisites for viable policy formulation. The supply, demand and management foundations for tourism strategy, program and project planning and development are intimately linked to, and to a considerable extent circumscribed by, these geographic realities.

From the perspective of Ontario North of 50° and for purposes of this study, three distinct but closely related regional geographic divisions are recognized: the *Northern Primary Industrial Region* in the southwest part of the study area, the *Northeastern Lowlands Region* with its associated tidewater settlements, and the *Intermediate Transitional Region* of pending development.

Northern Primary Industrial Region

The *Northern Primary Industrial Region*, occupying the southwest part of Ontario North of 50°, is characterized by large continuous expanses of commercially productive softwood forests, pockets of mining and power development, and a fairly dense road, highway, and air transport network. Only the pulp and paper mills that typify this region where it occurs farther south in Ontario are absent. The cultural pattern of this region is dominated by a non-native population espousing southern Canadian socio-economic values, lifestyles and expectations.

The rugged rock and lake terrain of this region, its pleasing Boreal forest cover, and its excellent hunting and fishing resources have proved to be highly attractive for tourism industry and outdoor recreation development. The tourism development, however, is rapidly approaching the limits of the resource foundations of the area and in many places the industry is actually under severe stress due to the decline of angling and hunting potentials and the loss of remote or wilderness attributes, both the result of forest and mining road construction and the pervasive and intensive public recreation use that they induce.

This relatively small part of Ontario North of 50° is a component of the vast Mid-Canada regional complex that has received considerable attention in recent years. Here the region lies at the northern fringe of the complex, which is more intensively and extensively represented in those parts of Ontario situated to the north of the Lake Nipissing-French River Corridor and extending to the Manitoba border.

Intermediate Transitional Region

The extensive *Intermediate Transitional Region* of pending development situated mainly between the *Northern Primary Industrial Region* in the southwest part of Ontario North of 50° and the *Northeastern Lowlands Region* is more akin to the former in its physical environment and to the latter in its social characteristics. Here a degree of economic development, including the tourism industry, appears imminent, a feature of major consequence from the standpoint of the interests and concerns of the Royal Commission on the Northern Environment.

This transitional region is a component of the Canadian Shield and thus structurally similar to the adjacent region to the southwest. The major natural geographic features differentiating the two regions are associated with climatic and biological characteristics that, in the *Intermediate Transitional Region*, are in transition to the patterns of the *Northeastern Lowlands Region* to the northeast. The climate is harsher with the winter season being longer than the summer and the latter less intense in its temperature regime. This is strongly reflected in vegetative patterns, particularly in the absence of expansive areas of commercial forest. Fish and game resources are noticeably less productive per square mile of terrain or acre-foot of

water, although some good concentrations are present in specific locations. The ability to sustain the pressure of prolonged intensive exploitation is markedly less than in the southwest.

Economically, the *Intermediate Transitional Region* is weaker than the southwest in terms of the variety and strength of both its individual sectoral and combined endowments. Currently its economy is probably somewhat stronger than that of the *Northeastern Lowlands Region* and long-term prospects assessed from the perspective of current knowledge of natural resources and development technology suggest that this disparity will increase. Only the discovery of exploitable gas and oil resources in the Lowlands or the development of the lignite deposits in the Onakawana area could upset this comparative longer term assessment. Overall, fishing intensity is at or close to its limits, but some reasonably strong expansion of sport camps at discrete locations is possible and there appear to be opportunities for some additional sport hunting camp operations. Considerably more effective exploitation of the trapping opportunities appears possible. The region's biological resources, however, cannot be subjected to the pressures which those to the south have experienced without a devastating decline in stocks in a very short time. Although no mining developments are present, future prospects are probably as strong as those associated with other parts of the Shield. Access is essentially by air with winter roads providing linkage to some towns and highway locations to the south.

The population in the various small communities of the *Intermediate Transitional Region* is predominately Indian, speaking Ojibway, Cree and Saulteaux. Sometimes all three languages are in use in a community in addition to English. In this dominance of the Indian ethnic population, the region is akin to the *Northeastern Lowlands Region*.

The region appears to be one of pending development, particularly in the tourism sector and probably in the commercial forestry sector. The current restraint on the expansion of non-native enterprises to the north of the 7th and 11th baselines and the Albany River imposed by government land and resource allocation policies is not likely to persist much longer.

Of major importance, economic development pressures emanating from the south are poised to expand into distinctly different natural and cultural environments. The limited strength of the forest and biological resources of the *Intermediate Transitional Region* and the region's predominantly native culture contrast sharply with conditions to the southwest. The full extent of the opportunities present and the most suitable approach and method to establish profitable endeavours and attain desired social objectives remain uncertain for both the government and private enterprise. Nevertheless, it is virtually certain that intensified economic activity is imminent over a wide front, and particularly in the tourism sector.

Northeastern Lowlands Region

The *Northeastern Lowlands Region* and its associated tide-water area represent the third distinct geographic region of Ontario North of 50°. This is a structural and physiographic entity generally contiguous with the relatively poorly drained terrain of the Palaeozoic rock lowlands flanking Hudson Bay and James Bay and their fringing raised sand beach ridge complexes that are massive in scale at many places. The Forest/Barren vegetative cover of the Lowlands represents the southernmost salient of the vast belt of this transitional formation that stretches across northern Canada between the barren grounds of the Arctic to the north and the Boreal forest to the south and west.

Compared to those of the southwestern parts of Ontario North of 50°, this region's economic foundations are markedly less varied and strong. Extensive commercial forests are absent, although limited pockets of good saw timber are present in protected river locations. Biological resources are considerably less varied and productive, quality sport angling being confined to a few favoured locations and commercial fisheries being virtually absent. Moreover, the resources present are highly susceptible to collapse under excessive sustained pressures of exploitation. Their recovery can be lengthy and perhaps virtually non-existent in some situations. The existence of large migratory goose populations in the coastal estuary marsh areas, anadromous trout in some streams flowing to the coast and modest polar bear concentrations at favoured locations represents exceptions to this generalization of importance to tourism.

In the *Northeastern Lowlands Region*, general economic conditions are weak and opportunities limited in variety. There are no commercial forest, hydro power or mining operations. Air transport is the dominant means of access, with roads being non-existent except for local community systems, winter roads and snowmobile trails. The rail connection from Moosonee to the south is an interesting anomaly that serves more as an asset to tourism, local community supply, and native resident travel than as an infrastructural element stimulating economic development. Economic exploitation of the waters of Hudson Bay and James Bay is virtually non-existent, and barge transport between the railhead at Moosonee and settlements farther north along the coast has virtually terminated. The extensive shallow inshore marine waters represent a hostile and forbidding environment for the local residents.

The population, dominantly native and possessing distinctly different values and lifestyle expectations than those of the non-native groups to the south, is concentrated in settlements on the shores of Hudson Bay and James Bay. While 85 to 90 per cent of the Moosonee/Moose Factory Development Area is Cree speaking, a strong element of non-native culture is evident, particularly in Moosonee.

Pressures for Change

The native populations and cultures that dominate over the greater part of Ontario North of 50° are undergoing considerable stress and transition. The introduction of southern Canadian communications, especially radio, motion pictures and more recently television, has exerted a powerful and not always beneficial thrust for change. The growing population is outstripping the capability of the natural resource supply in the community hinterlands to provide adequate food and income through the traditional pursuits of trapping, hunting and fishing. Few local employment opportunities exist in the service sector of these small communities to supplement these traditional pursuits. For these reasons, the economic future of this largest group of remote northern residents is uncertain at best. The increasing need for modern technical training to meet possible future local employment opportunities or provide that base of skills required for outward migration from Ontario North of 50° represents another threat to the cultural and economic stability of these northern settlements.

Regional Tourism Capabilities

In Ontario North of 50°, the current and prospective supply and demand foundations for tourism are critically related to, or defined by, natural and cultural landscape patterns. Therefore, the regional geographic divisions described differ greatly in their capability for tourism development.

Through synthesis of several diagnostic natural and cultural features, Ontario North of 50° can be divided into three broad regions of differing capability for tourism development. Their distinguishing parameters and criteria are shown on Chart 4 and their boundaries are portrayed on the accompanying map.

The natural resource potentials of the more northerly parts of Ontario North of 50°, including the whole of the Hudson Bay and James Bay Lowlands, remain to be inventoried over the next few years under the district land use planning process of the Ontario Ministry of Natural Resources. While the results of these inventories should provide considerable new detailed information on natural resource features, and hence on the capability of the supply foundations for tourism, it is expected that the statements of broad potential, opportunity and constraint made in this report will not need to be altered substantially.

Southern Shield

The *Southern Shield* is considered to have *mass, multi-functional, vacation/holiday, travel/destination and special wilderness activity capabilities*. This region is designated multi-functional because it possesses the natural and cultural supply foundations and market relationships required to support two major divisions of tourism that are characteristic of Ontario: general vacation-holiday and special wilderness activities. From the standpoint of the former, this region lies at the northern limit of viable summer outdoor cottage,

CHART 4

REGIONAL SUMMARY OF TOURISM DEVELOPMENT CAPABILITY
IN ONTARIO NORTH OF 50°

CAPABILITY AND QUALITY MEASURES FOR NATURAL AND CULTURAL SUPPLY FOUNDATIONS FOR TOURISM	CAPABILITY REGION		
	Southern Shield	Northern Shield	Lowland/Tidewater
<u>Aggregate Capability</u>	Mass, Multi-Functional, Vacation-Holiday, Travel and Destination Area Capabilities, with Opportunities for Special Wilderness Activities	Special Activity Capabilities in Remote Boreal Forest Wilderness and Indian Cultural Atmosphere	Special Activity Capabilities in Remote Lowland/Tidewater Wilderness and Indian Cultural Atmosphere
<u>Associated Activities</u>	Camping, cottaging, rental accommodation, automobile landscape touring, remote fly-in hunting and angling from base and outpost sport camps	Angling and hunting sport camps, wilderness travel by water and snowmobile trails, landscape touring in Indian settlement area	Goose hunting sport camps with limited angling, natural history tours, Indian settlement-focused landscape tours by air and rail to Moosonee, major river canoe trip destination services

CHART 4 (continued)

REGIONAL SUMMARY OF TOURISM DEVELOPMENT CAPABILITY
IN ONTARIO NORTH OF 50°

CAPABILITY AND QUALITY MEASURES FOR NATURAL AND CULTURAL SUPPLY FOUNDATIONS FOR TOURISM	CAPABILITY REGION		
	Southern Shield	Northern Shield	Lowland/Tidewater
<u>Natural Features</u> Climate			
1. High Season	<p>Northern limit of requirements for multi-functional summer tourism vacation area on the Shield</p> <p>Length: Short (3 mos.)</p> <p>Quality¹: Fair</p>	<p>Satisfactory only for specialized outdoor sporting activities (hunting, fishing, wilderness travel and landscape touring)</p> <p>Length: Short (2-3 mos.)</p> <p>Quality¹: Fair to poor</p>	<p>Marginal for specialized outdoor sporting activities (hunting, fishing, wilderness travel and landscape touring)</p> <p>Length: Very Short (0-2 mos.)</p> <p>Quality¹: Poor</p>
2. Winter	<p>Exceptionally strong for winter outdoor tourism activities</p> <p>Length: Long (6.5 - 7.0 mos.)</p> <p>Quality: Excellent</p>	<p>Strong for winter outdoor tourism activities</p> <p>Length: Long (7 - 7.5 mos.)</p> <p>Quality: Excellent</p>	<p>Good conditions for winter outdoor tourism activities</p> <p>Length: Very long (7.5 mos. plus)</p> <p>Quality: Good</p>

CHART 4 (continued)

REGIONAL SUMMARY OF TOURISM DEVELOPMENT CAPABILITY
IN ONTARIO NORTH OF 50°

CAPABILITY AND QUALITY MEASURES FOR NATURAL AND CULTURAL SUPPLY FOUNDATIONS FOR TOURISM	CAPABILITY REGION		
	Southern Shield	Northern Shield	Lowland/Tidewater
Terrain (Land, Water, Vegetation)			
1. General Tourism and Outdoor Recreation Terrain Capability	Generally moderate out- door recreation and tourism development capability for a Shield setting; much of region has low capability	Considerable moderate outdoor recreation and tourism development capability for a Shield setting interspersed with large areas of low capability	Dominantly low outdoor recreation and tourism development capability with traversing river and coastal strips of moderate capability; traversing rivers are Severn, Winisk, Attawapiskat, Albany, Moose
2. Geology and Physiography	Good outdoor recreation and tourism aesthetic values associated with irregular relief of parallel ridges of Precambrian rock, lacustrine flats and morainic overburden	Good outdoor recreation and tourism aesthetic values associated with Shield and strong representation of eskers and moraines in northern parts	Poor outdoor recreation and tourism aesthetic values associated with flat, poorly drained plains

CHART 4 (continued)
REGIONAL SUMMARY OF TOURISM DEVELOPMENT CAPABILITY
IN ONTARIO NORTH OF 50°

CAPABILITY AND QUALITY MEASURES FOR NATURAL AND CULTURAL SUPPLY FOUNDATIONS FOR TOURISM	CAPABILITY REGION		
	Southern Shield	Northern Shield	Lowland/Tidewater
3. Hydrography	Very good outdoor recreation and tourism potential in headwater areas draining to Lakes Winnipeg and Nipigon; typical deep rock-controlled Shield lakes and moderate rapids; interesting canoeing waterways; water temperatures often permit swimming	Good outdoor recreation and tourism potential; headwater area for most major rivers draining to Hudson Bay and James Bay; typical Shield rock-controlled lakes and river rapids; interesting canoeing waterways; water temperature generally too cold for swimming	Poor outdoor recreation and tourism potential associated with shallow lakes and ponds of the poorly drained morass of the flat coastal plain; main traversing rivers have flat profiles and relatively uninteresting water compared to their Shield sections; water temperatures too cold for swimming

CHART 4 (continued)

REGIONAL SUMMARY OF TOURISM DEVELOPMENT CAPABILITY
IN ONTARIO NORTH OF 50°

CAPABILITY AND QUALITY MEASURES FOR NATURAL AND CULTURAL SUPPLY FOUNDATIONS FOR TOURISM	CAPABILITY REGION		
	Southern Shield	Northern Shield	Lowland/Tidewater
4. Forest Cover	<p>Naturally attractive; Upper and Lower English River Sections of Boreal Forest largely a transition between Great Lakes/St. Lawrence Forest Region to south and Coniferous Section of Boreal Forest Region to north; variety of species a feature of main body of the forest that includes white and black spruce, balsam fir, aspen, white birch and jack pine, scattered red and white pine, green ash and bur oak; some large burned or cut over areas not attractive</p>	<p>Limited attractiveness overall, with black spruce dominant in the Northern Coniferous Forest Section situated northward from the Albany River and jack pine and black spruce in the Central Plateau Section centred to the south of that river; margins of lakes and river banks moderately attractive with mixed stands of white spruce, balsam fir, aspen, balsam poplar</p>	<p>Very limited attractiveness, but interesting because of intermixture of barren lands that are at the most southerly limit of their range in mainland Canada; open stands of stunted black spruce and tamarack in expanse of swamp and muskeg; white spruce that is tolerant of sea conditions forms maritime treeline; moderately attractive river valley stands of white spruce, aspen, balsam poplar and white birch, extending to, or almost to, the coastline</p>

CHART 4 (continued)

REGIONAL SUMMARY OF TOURISM DEVELOPMENT CAPABILITY
IN ONTARIO NORTH OF 50°

CAPABILITY AND QUALITY MEASURES FOR NATURAL AND CULTURAL SUPPLY FOUNDATIONS FOR TOURISM	CAPABILITY REGION		
	Southern Shield	Northern Shield	Lowland/Tidewater
Biological 1. Fish (Angling)	<p>Naturally strong resources for sport camp development at limited points with much of the area actually in a state of decline due to loss of remote fishing waters and excessive pressures resulting from unrestricted public access via forest access roads; remote sport camp development past its peak over much of the area</p>	<p>Moderately strong resources for sport camp development at select locations and much of the potential remains unutilized or underexploited; cannot sustain use pressures experienced in south without collapse due to lower productivity per acre-foot of water; moderately strong distribution of deep water trout lakes and river fisheries for pike, brook trout and pickerel</p>	<p>Limited opportunities for sport camps, essentially confined to Sutton and Hawley Lakes in Precambrian rock outlier; lakes of Palaeozoic lowlands too shallow; inventory may reveal an anadromous trout sport fishery in some main rivers</p>

CHART 4 (continued)

REGIONAL SUMMARY OF TOURISM DEVELOPMENT CAPABILITY
IN ONTARIO NORTH OF 50°

CAPABILITY AND QUALITY MEASURES FOR NATURAL AND CULTURAL SUPPLY FOUNDATIONS FOR TOURISM	CAPABILITY REGION		
	Southern Shield	Northern Shield	Lowland/Tidewater
2. Mammals	Moderate moose hunting potentials now relatively fully exploited and limited capacity for expansion; woodland caribou viewing opportunities	Extensive areas of dense moose concentrations north of the Attawapiskat River and 52° N. lat. suitable for sport hunting camp operations; woodland caribou viewing	Poor moose hunting potential for sport camps; polar bear viewing good and fair walrus viewing off Cape Henrietta Maria
3. Birds	Local resident hunting resource only	Limited goose hunting possibilities	Superb goose hunting and some possibilities for sport camp expansion; shore bird observation potential is strong

REGIONAL SUMMARY OF TOURISM DEVELOPMENT CAPABILITY
IN ONTARIO NORTH OF 50°

CAPABILITY AND QUALITY MEASURES FOR NATURAL AND CULTURAL SUPPLY FOUNDATIONS FOR TOURISM	CAPABILITY REGION		
	Southern Shield	Northern Shield	Lowland/Tidewater
Cultural Features Provincial Parks 2	<p>Strong Tourist Attractions:</p> <p>3 Wilderness Parks (Woodland Caribou 450,700ha, Wabakimi 155,000ha, and Kesagami Lake 54,200ha):</p> <p>2 Natural Environment Parks (Pakwash & Pakwash Addition 2,700 ha):</p> <p>3 Waterway Parks (Brightsand pt. 2,800ha, Kopka R. pt. 11,000ha, Little Current R. pt. 9,800ha):</p> <p>Nature Reserve Parks (Sedgman L. 5,800ha, Trout L. 7,850ha, Windigo Bay 8,300ha, Windigo Point 380ha):</p> <p>4 Areas of Natural and Scientific Interest (Bow R., Fawcett L., Whitemud R., Windfall Cr.)</p>	<p>Strong Tourist Attractions:</p> <p>Wilderness Park (Opasquia 460,000ha):</p> <p>8 Waterway Parks in headwater areas and upper reaches (Fawn R. Severn R., Winisk R., Pipestone R. North, Pipestone R. South, Little Current R., Otokwin-Attawapiskat R., Albany R.):</p> <p>21 Areas of Natural and Scientific Interest (Apps L., Cobham R., Flanagan R., Foaming Cr., Gonyea L., Goose R., Jobes Cr., Kaneesose L., Kishikas L., Mix L., Nango L., Obashi L., Poplar Cr., Roseberry R., Tabasokwia L., Waterous L., Wharram L., Wunnummin Hill</p>	<p>Strong Tourist Attractions in Coastal Area:</p> <p>1 Wilderness Park (Polar Bear 2.4 million ha):</p> <p>2 Waterway Parks in lower sections (Winisk R., Missinaibi R.) and other excellent lower river courses likely to be designated as waterway parks after MNR inventory completed in Moosonee District (Severn R., Attawapiskat R., Albany R., Moose R.):</p> <p>7 Nature Reserve Parks (Hobson, Valentine, Pitt, Sanborn Twp. totalling 63ha)</p>

CHART 4 (continued)

REGIONAL SUMMARY OF TOURISM DEVELOPMENT CAPABILITY
IN ONTARIO NORTH OF 50°

CAPABILITY AND QUALITY MEASURES FOR NATURAL AND CULTURAL SUPPLY FOUNDATIONS FOR TOURISM	CAPABILITY REGION		
	Southern Shield	Northern Shield	Lowland/Tidewater
Prehistoric Sites	Limited from tourism development perspective	Limited from tourism development perspective	Limited from tourism development perspective
Historic	Moderately strong potential inputs to landscape touring associated with fur trade era and industrial development	Modest potential inputs to landscape touring associated with fur posts at scattered locations	Valuable potential inputs to landscape touring associated with fur trade era and French/English conflict pre-1759
Indian Occupation	Limited resources except for rock paintings that represent valuable input to landscape tours and are sufficiently strong attraction to draw tourists on single purpose visitation	Rock paintings at a few scattered sites a cultural input to landscape touring; settlements a moderate attraction for landscape touring	Settlements a strong attraction for landscape touring
Transport/Access	Moderate costs to access resources by good road or plane arteries and connections	High cost to access resources by plane travel; reasonable internal winter road and snowmobile network for tourist use	High cost to access coastal resources by plane and very high cost to far northern points; inexpensive to access Moosonee/Moose Factory by railway

CHART 4 (continued)

REGIONAL SUMMARY OF TOURISM DEVELOPMENT CAPABILITY
IN ONTARIO NORTH OF 50°

CAPABILITY AND QUALITY MEASURES FOR NATURAL AND CULTURAL SUPPLY FOUNDATIONS FOR TOURISM	CAPABILITY REGION		
	Southern Shield	Northern Shield	Lowland/Tidewater
Local Market and Skills	Reasonably strong local market from industrial and service centre communities; adequate entrepreneurial and labour skills available	No local market potential but available Indian labour and entrepreneurial supply requiring some training	No local market potential but available Indian labour and entrepreneurial supply requiring some training

1. Refers to quality of the full range of summer outdoor recreation activities including vigorous sports, beaching, swimming, and lounging and to the quality of skiing and snowmobiling in the winter season.
2. All park and related areas indicated are of "recommended" status with only the Wilderness and Natural Environmental Parks having an officially designated status. The resources of the Lowland/Tidewater region will not be fully identified until the inventory of the Moosonee District of the Ministry of Natural Resources has been completed.

resort and water-beach oriented tourism development; farther north, climatic conditions become marginal to sub-marginal for these activities. Winter outdoor activity opportunities, however, are ideal. Supply attributes for remote or fly-in hunting and fishing sport camp operations have been excellent from the standpoints of climate, terrain attractivity, the variety and abundance of desirable fish and game species, and the capacity of the biological resources to maintain quality under considerable pressure. Native people's influence on the tourism supply foundation and operational patterns is limited and there is no major native socio-economic setting to exert a decisive psychological impact on the tourist.

Present tourism development patterns in the region have reached a state of maturity, and a decline in potentials and prospects has taken place in some instances. Opportunities for new base and remote outpost hunting and fishing camp development are virtually exhausted. In fact, many areas are now in a state of rapid decline due to the loss of their exclusive remote attributes and excessive pressures placed on fish and game resulting from the construction of forest access roads and the heavy influx of local resident hunters and anglers. Angling in most of the areas of roadside rental cabins and cottages has deteriorated markedly. In contrast, historic resource potentials of interest to landscape tourists remain undeveloped. Moreover some opportunities for new cottage and resort development to meet the demands of the vacation and holiday market appear to be present in a few favourable locations.

Tourism development in the region appears to have reached a stage when major reorganization and redevelopment of the tourism plant is required if the industry is to remain a viable business and economic sector. There will likely be a shift towards the development of resorts focused primarily on the opportunities for vacations for the general family or young adults in the summer and perhaps winter seasons. Retirement living developments for use in the warmer season are a possibility. An improvement in the region's attractivity for the general highway-travelling landscape tourist, particularly through the development of the historic and cultural resources, appears to offer substantial potential benefits to the industry.

Northern Shield

The *Northern Shield* is characterized by *special activity capabilities in remote Boreal forest wilderness and Indian cultural atmosphere*. In contrast to the *Southern Shield*, opportunities for mass multi-functional summer and winter tourism are absent. The summer climate and the water temperatures of the region are unsuitable for major vacation destination area tourism facilities. As the region is accessible only by air, mass landscape touring centered on highway travel is absent, with no imminent prospect of change. Given the expanses of unsettled wilderness between populated communities and the character of the waterways, only the more enthusiastic and experienced canoe and small boat travellers would be prepared to enter the region.

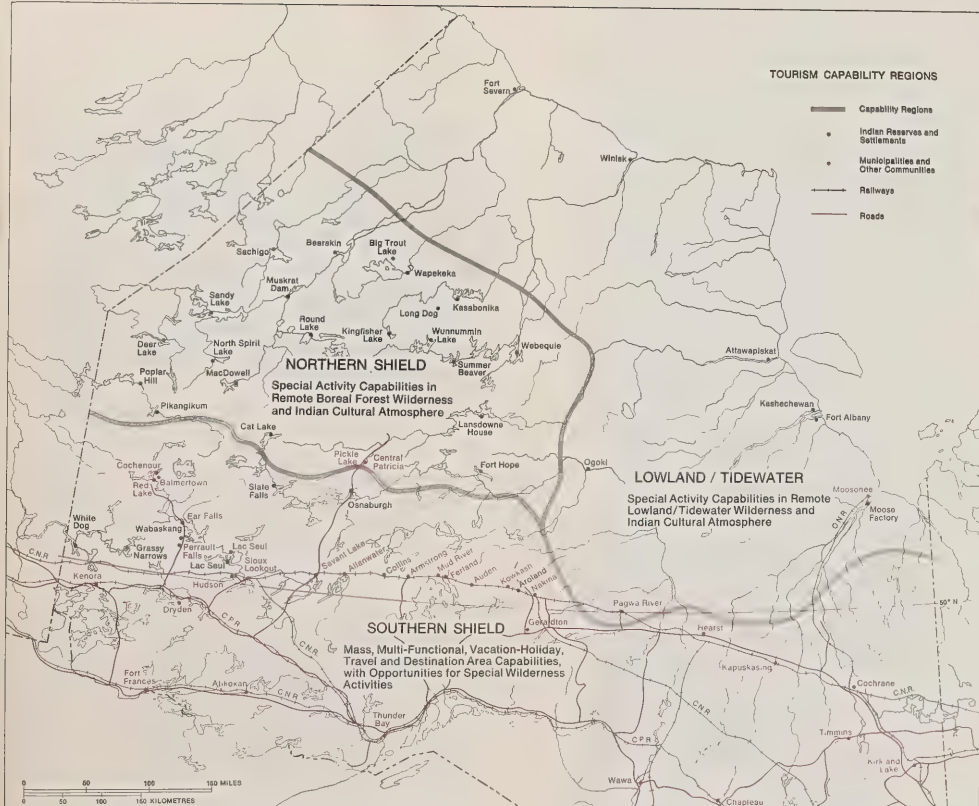




Plate 3: Successful hunt, north of Cochrane. (Source: Ministry of Tourism and Recreation.)

While the fish and wildlife resources available to tourism are generally moderately strong, and excellent at some locations, productive capacities per square kilometer of terrain or per acre-foot of water are not as high as in the *Southern Shield*. They will not sustain angling and hunting pressures of a similar intensity without speedy deterioration and in some cases virtual collapse in terms of the requirements for viable remote sport camp operations. The market in this instance is highly competitive, so that only those camps offering high quality angling and hunting can survive for a considerable period of time.

In recent years, tourism development opportunities for angling and moose sport camp construction and operation have been taken up to a considerable degree by native people and to a lesser degree by operators from the south. Opportunities for new development and expansion exist at discrete locations where fish and game resources are in sufficient supply. Pressures exerted by non-native operators situated to the south of the 7th and 11th baselines and the Albany River to utilize these resources are mounting steadily. Development of existing potentials is imminent.

Excellent resources are available for the introduction of conducted wilderness canoe trips down the numerous major rivers leading to the coast. These could be organized, marketed and guided by native people. Winter snowmobile tour opportunities, possibly integrated with the "experience" type of holiday package at native-operated winter trapping cabins, are plentiful. Landscape tours in winter or summer focused on, or organized around, the native settlements are a good possibility given the physical and cultural patterns present in many parts of the region.

Lowland/Tidewater

The *Lowland/Tidewater* region is considered to have *special activity capabilities in Indian atmosphere of the wilderness/tidewater belt*. As in the *Northern Shield*, and for similar reasons, opportunities for mass multi-functional summer and winter tourism are almost absent. Moosonee/Moose Factory, at the tidewater terminus of the Ontario Northland Railway, experiences mass volume, low cost landscape tourism based on rail travel and is the only exception.

Opportunities for major sport camp development based on goose hunting exist in the estuary areas of most large rivers and have been extensively exploited. Prospects for the expansion of camps are probably limited in number and scale, at least as much by the availability of readily accessible and reliable aircraft landing sites as by the availability of birds to hunt on a sustainable-yield basis.

Angling sport camp prospects in the region are primarily associated with Precambrian rock at Hawley and Sutton Lakes to the south of Winisk. Resources here have been almost fully allocated for sport camps. The water bodies of the Palaeozoic Lowlands are of low productivity, being little more than shallow ponds in most cases. On many of the rivers, sea-run or anadromous brook trout populations may prove of sufficient strength to be the main foundation for sport camp operations, or to form a valuable supplementary support to some other type of tourist operation.

For strategic and resource reasons, the region displays strong capabilities for special landscape tour operations. The native coastal settlements provide an attraction of considerable strength. There are interesting historic associations with the French-English conflict on Hudson Bay and James Bay prior to 1759; near Fort Severn, foundation ruins of a fort are clearly visible in the ground after archaeological investigation several years ago. The natural history features of the tidewater section — waterfowl and shore bird concentrations, Boreal/Barrenland transition vegetation, and physiographic formations including massive beach strands and tidal flats — are of sufficient strength to attract professional scientists, students, and dedicated amateurs. Polar Bear and Kesagami Provincial Wilderness Parks, especially the former, have been scarcely exploited from a tourism development standpoint. The lower courses of major river canoe routes originating on the Shield traverse the lowlands and terminate at the coastal settlements.

This assemblage of natural and cultural features provides excellent opportunities for the development of a variety of special landscape package tours. A group of coastal settlements could be combined in an air tour that involves short day or overnight stays at each. A visitor program of events including tours in and around the settlements could be offered. On the other hand, a tour package might offer a stay at only a single settlement, possibly using the accommodation of an adjacent goose camp. Provided that there is suitable accommodation in a settlement, attractive winter season tours could be operated. Highly attractive wilderness tours in Polar Bear Provincial Park at all seasons of the year could be organized from Winisk.

The mass tourism of Moosonee/Moose Factory, representing a special situation arising from cheap rail access, is expected to continue, though prospects for expansion remain uncertain. It is important to note that considerable public funds to strengthen destination area attractions and stimulate interest in the train trip have proved necessary to maintain traffic volume on the Polar Bear Express, despite the low tariffs.

The development of the potentials and the ownership of facilities in all areas outside Moosonee/Moose Factory will likely be primarily and perhaps exclusively in native hands. Many goose camps have been developed for Indians, and most non-Indian operations that once existed in the tidewater area have been purchased by government and incorporated into the operations of Indian goose camps. It is expected that this pattern of Indian ownership and operation will be followed in any development of tour packages in the coastal settlement areas.

Overall, the region presently displays a strength for tourism development that is greater than that of the *Northern Shield*, largely because of the goose camp operations and the destination area facilities associated with the Polar Bear Express. In the long haul, however, the two regions may prove to be about equal in strength. The future development of tourism in the Lowlands region depends on the organization and marketing of landscape tour packages on a substantial scale, for it is on this aspect that the major expansion prospects for tourism in the region appear to rest.

RATIONALE FOR AN HISTORIC PERSPECTIVE

The introduction of an historic perspective can contribute substantially to the explanation of the current pattern of tourist facility development in Ontario North of 50°. It can thereby enhance the policy and decision-making processes associated with strategy, program and project planning for future public and private investment. In some situations, an historic perspective may be as significant as or even more significant than the physical geographic dimension that invariably receives major, and often sole, consideration.

Existing development patterns in Ontario North of 50° are the expression of a great many factors: the decision-makers' appreciation of the nature of the geographic environment, the technological capacity of the time and, above all, personal and group imagination, initiative and outlook on risk. In addition, government attitudes to resource allocation and financial assistance of a direct or indirect nature have often been critical elements. For these reasons, adequate attention must be given to the historic or historical/geographical dimension in the final policy formulation process.

GOAL OPTIONS

General qualitative statements of goals tend to be idealistic and to conform to accepted social, economic and environmental values for the society in which they are promulgated. One of the serious limitations associated with many planning studies is that their recommendations scarcely reach beyond policy goal statements of this "motherhood" type. While such goal statements are "safe" in that they expose the planning or the client government agency to little that is of a penetrating and controversial nature, they contribute little to substantive action.

In this study, a serious attempt has been made to avoid this pitfall by the formulation of realistic goal options that are linked directly to, or flow naturally from, broad conceptual and operational divisions in the tourism field and the issues related thereto. The danger of setting up straw men as policy options has been recognized and avoided, sometimes by simply not presenting a dummy entry as an alternative; in this case, it is simply acknowledged that no rational, viable option exists, or appears to exist, within the context of the current social, economic, technological and natural environments of Ontario North of 50°.

GENERAL GOAL

Government's general goal for the tourism sector is to create and maintain a climate of legislation, regulations and administrative structures and processes that will encourage private investment in the sector in Ontario North of 50° so as to maximize sustained profit, employment and income levels and derive reasonable revenues consistent with:

- the retention and, where possible, the enhancement or rehabilitation of natural and cultural environmental phenomena that represent the indispensable supply foundations of the tourism industry;
- the balancing of competing and complementary demands of private industry and the general public for natural resources for economic production (such as for forestry, mining and commercial fishing) and for the attainment of social objectives (including public parks, recreation and wilderness);
- the desires of the local resident population, particularly the native people in the remote areas to the north of the 7th and 11th baselines and the Albany River, for tourism development;
- the protection of consumer interests, particularly those related to safety.

This general statement is consistent with social, economic and environmental values that represent the norms for Ontario. Its usefulness lies essentially in the identification and organization of these norms. No realistic options or alternatives can be formulated at this general goal level.

SPECIFIC GOAL OPTIONS

Related to the Geographic Distribution of Economic Benefits

To capture maximum opportunities for investment, profits, income and employment for the resident population. And, in the remote parts to the north of the 7th and 11th baselines and the Albany River, to retain these opportunities for the local native population, on a first choice or refusal basis;

OR

To remain completely neutral to the geographic distribution of economic benefits, or perhaps to open them to all Ontario residents or Canadian citizens equally.

The above goal option is a major one to which there must be an almost immediate response. The selection of a local resident focus and, in the far north of Ontario North of 50°, a local native focus as the ultimate goal would demand the adoption of numerous implemental strategy thrusts if it were to carry any real substance or meaning.

In any discussion of this goal, the interests of the native people of Ontario North of 50° are of major consequence. Effective efforts must be made to ensure that they are adequately represented in any ultimate decision-making process.

Related to Disturbance of Existing Socio-Economic Conditions

To reduce disturbances and disruptions to existing socio-economic conditions in the region to a minimum, including those related to current tourism development, even at the sacrifice of a substantial degree of economic benefits;

OR

To remain essentially neutral to disturbance, considering it to be a legitimate cost of development, including development in the tourism sector.

Tourism development may be regarded as an economic benefit that will inevitably occasion a degree of disruption to existing social patterns and work routines. On the one hand, the government may remain essentially neutral to the impact, considering it to be a normal and

inevitable consequence of economic development and diversification in the region. Alternatively, it may seek measures to reduce disruptions to a minimum, even though some such measures may knowingly reduce beneficial economic effects to a degree. In other words, socio-economic compatibility would dominate over purely economic and business viability considerations.

Related to Individual Initiative

To emphasize government stimulation of individual private initiative in the development of tourism in Ontario North of 50° by minimizing government controls and regulations to a degree consistent with overall social, economic and natural environmental goals and by introducing financial incentives.

OR

To remain essentially neutral to special financial stimulation of individual private initiative, possibly emphasizing highly controlled and regulated development.

Clearly, some degree of regulation and control is required in the interests of the general public and for resource conservation and preservation. On the other hand, an onerous structure of government rules and regulations can stifle private initiative.

OBJECTIVE OPTIONS

In this study, no framework of alternative or optional objectives for the development of tourism in Ontario North of 50° has been prepared. The investigation did not call for the preparation of spatially, temporally and quantitatively explicit statements of this type. Valid targets for investment, income, employment, visitor volume and expenditure or for the scale of natural resources required to satisfy the needs of the tourism sector can be defined only after more detailed research has been completed. Objectives must be realistic, factually supported statements of quantity, timing and location. It would be of no value, and possibly harmful, to generate a set of numbers that have no substantive foundation and really amount to little more than a wish list that could arouse unattainable expectations and stimulate private investment directed towards financially unprofitable situations. In the preparation of a framework of objectives, planners and policy makers have a primary obligation to be accurate and realistic rather than stimulative and promotional.

IMPLEMENTAL STRATEGY OPTIONS

The definition of implemental strategies represents the cutting edge of the optional aspect of policy formulation. In effect, this is the area of discussion where substantive and readily recognizable alternatives emerge from the generalities of the goal statements.

SELECTION OF APPROACH AND FOCUS FOR DISCUSSION

Operating Principles and Substantive Program-Process Options

In the discussion of concepts and terminology presented in the opening section of Part Two of this report, three components of implemental strategies were recognized: statements of operating principles, direction/ substance, and priority. Attention is directed initially to operating principles. This is followed by an intensive examination of the concrete or substantive program and process options. Limited and indirect attention is given to priority aspects for two reasons. First, priorities tend to flow naturally and logically from choices made related to operating principles and substantive program elements and processes. Second, the definition of priorities would carry this study beyond its intended limits into the more concrete realms of detailed and explicit tourism sector planning.

Provincial and Federal Government Interests and Responsibilities

As stated earlier in Part Two of the report, implemental strategy options are considered primarily in relation to government interests and responsibilities, although indirect reference to the tourism industry is made at appropriate points. While this approach places the responsibilities of the tourism industry for policy formulation in a secondary and reactive position in this study, it acknowledges that the industry has a responsibility through its associations to prepare its particular set of policy options to guide the development and operation of tourism.

Taking as given the basic orientation and limits imposed by this focus on government, the discussion of implemental strategies may be further narrowed in a number of ways. The sequential consideration of the subject in relation to the levels, structures, interests, concerns, and responsibilities of government is especially useful, as will be seen from the commentary that follows.

Both the provincial and federal governments have substantial interests and obligations related to implemental strategy formulation for tourism in Ontario North of 50°. In addition, the local municipal governments and various Indian administrative groups have significant concerns. The situation is summarized in Chart 5.

The federal Department of Indian Affairs and Northern Development has major legislative responsibility for the social and economic development of Treaty Indians, the main population component in the northern parts of Ontario North of 50°. Among the provincial agencies, the Ministry of Tourism and Recreation has a mandate for the preparation of tourism development strategies across all of Ontario, the Ministry of Northern Affairs for general social and economic policy matters over all of northern Ontario, the Ministry of Natural Resources for the management and allocation of the natural resource supply foundations of the tourism industry, and the Ministry of Citizenship and Culture for heritage resources. In addition to the federal and provincial agencies, the local band councils together with Treaty No. 3 and Treaty No. 9 and their creations, the project development areas, all have important interests in the field of tourism strategy formulation.

It is evident that a fairly diversified and complicated structure must be examined in the strategy formulation process, particularly when local government councils and tourism committees are added. Clearly, some operational clarification of the broad array of administrative structures with its varied interests and responsibilities is required.

The primary focus and central organizing frame of reference in this study are the federal and provincial government agencies; local Indian and municipal organizations are related to this primary focus wherever appropriate. This choice of focus has a twofold rationale. First, it supports the work of the Royal Commission on the Northern Environment which, to a major extent, focuses on the opportunities, constraints, issues and viable policy options confronting the provincial government on social, economic and natural environmental matters related to development in Ontario North of 50°. Second, it recognizes that governments must play a lead or catalytic role in the development of the tourism sector by virtue of the Ministry of Natural Resources' control of most of the natural resource foundations of the industry and the responsibilities of the Department of Indian Affairs and Northern Development for the socio-economic progress of Indians in the remote northerly parts of Ontario North of 50°.

In addition, the tourism industry must have a strategy of its own making and implementation. This is clearly the responsibility of the various regional and local tourism associations and would be a primary and immediate requirement of any Indian tourism association established in the future, as discussed later in this report.

Selected Roles and Functions of Government

Strategy options can be further articulated in terms of the four major roles of government relative to the development and operation of the industry. A brief examination of Chart 6 shows that strategy options are linked to the substantive operational decisions of the industry with which governments must interact through the consideration of major roles or functions.

CHART 5

RESPONSIBILITIES OF GOVERNMENTS FOR THE FORMULATION
OF TOURISM STRATEGY OPTIONS

<u>Provincial Government</u>	<u>Federal Government</u>
<u>Ministry of Northern Affairs</u> Responsibility for general policy for regional socio-economic development and some supporting initiatives	<u>Department of Indian Affairs and Northern Development</u> Responsibility for Indian socio-economic development in Ontario, including Ontario North of 50°
<u>Ministry of Tourism and Recreation</u> Responsibility for the development of the tourism sector throughout the province, including Ontario North of 50°	
<u>Ministry of Natural Resources</u> Responsibility for the maintenance and allocation of the natural resource supply foundations associated with Crown lands	
<u>Ministry of Citizenship and Culture</u> Responsibility for the maintenance and development of the heritage supply foundation	<u>Local Government</u> Local incorporated and unincorporated communities Indian governmental structures including Treaty No. 3 and Treaty No. 9, project development areas and band councils



Indicates Focus
of this Study

Strategy options can be considered in relation to the administrative organization for the performance of governments' roles. Some very important choices are associated with the institutional arrangements and are integrated into the discussion at appropriate points.

In this discussion of policy options, the primary focus is on the development, encouragement and support role. It is recognized, however, that the other three roles are important in the total scheme of government operations related to tourism. Reference will be made to aspects of these other roles where they relate to this primary focus.

Of the numerous functions associated with the performance of government's development, encouragement and support roles, two are discussed in this report, namely planning and marketing. In combination these two encompass the bulk of the major options available at the functional level.

Summary of Selected Foci

In Chart 7, the substance of the foregoing discussion is summarized in the form of a framework of foci for the consideration of implemental strategies.

The dual interests and responsibilities of the provincial and federal agencies implied in the schema of government jurisdictions, agencies, roles and functions are of major importance. To a considerable extent, these interests and responsibilities have imposed and continue to impose significant constraints on the development of tourism opportunities in the remote areas of Ontario North of 50°. These constraints require special administrative arrangements and procedures if they are to be overcome in an expeditious manner.

OPERATING PRINCIPLES

In the earlier discussion of goals, three sets of goal options are presented, i.e., options related to the geographic distribution of economic benefits, to the disturbance of existing socio-economic conditions, and to individual initiative. There is a direct connection between operating principles and these goals. This discussion of the operating principles associated with the implemental strategy component of policy flows directly from, and to an extent represents, a more refined, explicit and directed expression of these goals. Operating principles provide an operational definition of goals in the area of implemental strategy formulation. This, together with the introduction of new concepts, results in a distinct set of optional operating principles.

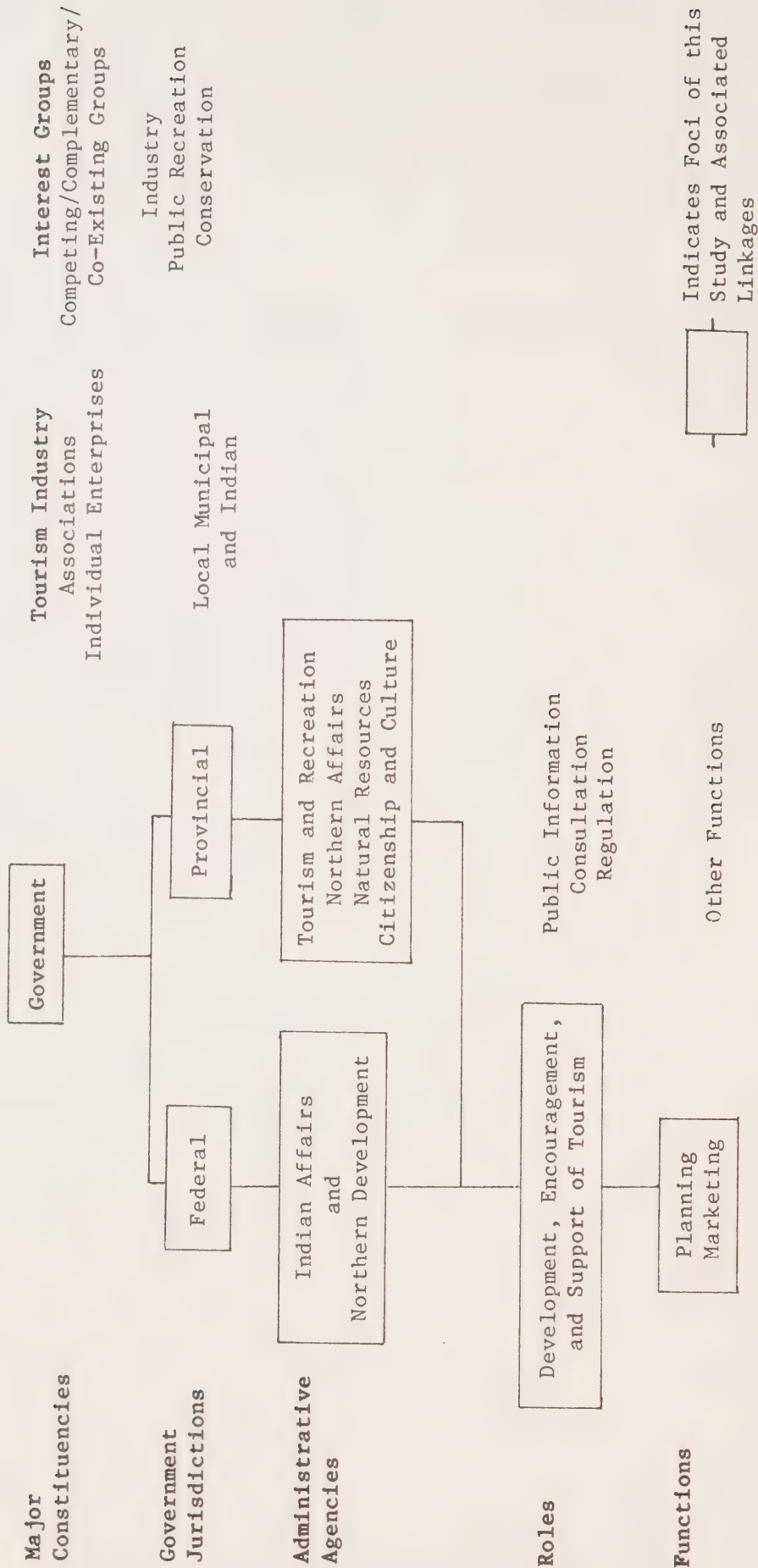
CHART 6

GENERAL ROLES AND FUNCTIONS OF GOVERNMENT
RELATED TO THE TOURISM INDUSTRY

<u>Role</u>	<u>Function</u>
Public Information and Consultation	Informing the tourism industry of government intentions, programs and projects and the nature of the decision-making processes related thereto; this involves discussion, consultation and public information programs.
Development, Encouragement and Support	Involves varying degrees of intervention related to natural and heritage resource supply maintenance, enhancement and allocation, and to marketing, financing, training and planning.
Regulation	Involves regulatory intervention for consumer protection including safety and fair pricing, and for fair wage and employment practices.
Research	Involves research activities related to the development, marketing and operation of potentials and the improvement of performance (efficiency and effectiveness) of other government roles.

 Indicates focus of this study

SUMMARY FRAMEWORK OF FOCI USED FOR DISCUSSION
OF OPTIONAL IMPLEMENTAL STRATEGIES



Considering the heterogeneous physical and socio-economic environment that typifies Ontario North of 50°, the rigid and universal application of the operating principles subsequently noted would be impractical, especially in the initial stages of industry stimulation and development. In effect, general operating principles must be adjusted to fit local or regional variations in the socio-economic milieu, particularly over short-run time periods. This does not render the consideration and expression of operating principles a useless exercise. The choices involved are elucidated, and divergences from established or long-range positions in special situations are made clearly apparent.

The options associated with the operating principles of any implemental strategy for tourism in Ontario North of 50° are a matter of real substance and consequence. While they are couched in general terms, they are pregnant with significant implications. This is especially true in the remote northern parts of Ontario North of 50° that possess distinctive physical and socio-economic geographic environments. In any approach to the preparation of implemental strategies for tourism development in the study area, serious consideration would therefore be given to operating principles, especially at the regional and local community levels, before any work of substance is commenced on an implemental strategy.

Related to the Control and Impact of a Tourism Strategy

Two significant optional operating principles related to the control and impact of the planning and development of tourism are set forth at the outset, since matters of fundamental consequence, particularly for those remote parts of Ontario North of 50° having a predominantly native population, are involved. These must be given very serious and detailed attention.

Strategy Developed Primarily Within the Region or Outside the Region

In the first case, the development of the strategy would be under the control of, and responsive to, the desires of the local resident population from its basic conceptual stages through to its final detailed program and project formulation. In the second case, the strategy would be developed beyond effective local influence and limited largely to a retrospective local review process. Moreover, in this case, local involvement could be limited to municipal and band councils and to tourist operators in the area or opened to broad community influence. Some compromise between both sets of these extremes will likely prove to be the most practical choice.

Disruptive Impacts to be Minimized or Accorded No Special Consideration

In the first case, the strategy would seek to minimize the disruptive impacts of tourism on the traditional lifestyles and socio-economic structures of the communities in Ontario North of 50°. While minimization of impacts would be particularly important to the predominantly Indian settlements in remote northern areas, it would have implications elsewhere. In the second case, the strategy would focus solely on the satisfaction of the interests and needs of the tourist and the tourism industry, giving no major regard to local social and economic impacts. In this case, the local population would, in effect, be forced to accept tourism of a kind demanded by the market place as envisaged by the planners. In the first case, the strategy formulation process would entail a purposeful selection from among a range of facilities, services and operating procedures with the intent to reduce undesirable social and economic impacts to a minimum.

Related to the Nature of the Tourist Plant

Industrial or Craft Plant

This pair of options entails a choice between the development and operation of sophisticated, industrial-type, high-quality facilities and services and the development and operation of a craft type of tourist plant.

In the first case, the tourist facilities and services would be intended to attract the upper expenditure cohort of the international market in an attempt to maximize economic benefits to the province, the region and the local communities. In this case, investment, management and control would reside primarily outside Ontario North of 50°. In the second case, a level of facilities and services within the financial, management and operating capacities of the local residents, or readily attainable by them with modest funding and training support by government, would be provided.

Consumptive Development or Non-Consumptive Development

In the case of the first option, the tourism development strategy would be based primarily on the consumptive use of fish, wildlife and other renewable natural resources for the development of hunting and angling camps in Ontario North of 50°, and particularly in the region's remote northern areas. In the case of the second option, the strategy would stress a non-consumptive form of tourism development in which tourists engage in an observing-learning experience within the communities and in the surrounding areas. This option could be particularly applicable to the remote Indian settlements, where tourists might be taken as observers on hunting, trapping and commercial fishing operations, or might simply visit communities and participate in or observe such activities as council meetings, church services, and other social events. At some places in the southwestern part of Ontario North of 50°, a relatively non-consumptive emphasis

could well be exemplified by a resort complex catering to a general family vacation. Probably a mix of these forms of tourism would be most desirable considering Ontario North of 50° as a whole, whereas strategies for individual areas might focus primarily on one or other of the choices listed.

Four Seasons or Summer Only

The strategy for tourism could focus primarily on the development of either a four season (year-round) industry in Ontario North of 50° or a mainly summer season industry. In the latter case the operating season would include the important spring and fall angling and hunting seasons as well as summer. This choice has enormous consequences for the design and construction of buildings and the generation of economic benefits.

Natural or Artificial

The first case would entail a primary focus on tourism based on natural, cultural and historic resources. The second would emphasize the establishment of such artificially implanted attractions as gambling casinos or funland facilities. While the extremes of this choice are readily recognizable, there are a host of marginal choices that must be made from time to time. Taken in combination, these choices can move the nature of the tourist plant from one focus to another almost imperceptibly.

Authenticity or Entertainment

In the first case, authenticity would take precedence over pure entertainment in the development of natural, cultural and historic features and events, particularly those taking the form of historic and cultural displays and re-enactments or community events. In the second case, features and events would be staged or simulated primarily in order to attract tourists and their expenditures, thereby generating considerable local employment and income impact but having only weak or peripheral links with the cultural and historic realities of the area or community.

Existing Development or Total Reorganization

The first case would entail a primary focus on the integration or incorporation of existing tourist facilities, such as hotels, motels, resorts and outpost camps, into the development strategy; indeed this could be considered a basic tenet of current planning procedures. In the second case, planning concepts would be developed solely in response to current supply and demand realities without reference to existing development, so that incompatible or inappropriate present developments would be systematically removed, with adequate compensation to owners, as part of plan implementation procedures. In those situations where much of the present plant is outmoded or rests on various short-term land-lease arrangements, such a total redevelopment would probably be feasible.

Related to Business and Economic Aspects

Private Responsibility or Public Sector Responsibility

In the first option, tourism would be considered essentially a private sector industry in all parts of Ontario North of 50° for both the short term and the long term, as is the case in the rest of the province. Government involvement would be limited to the provision of infrastructure support, including air and highway access, to natural resource management and allocation, to basic supply and demand research, and to the provision of incentive support in the form of development funding, advertising, and management and labour training.

In the second option, tourism would be considered a public sector industry, at least over the short run in the remote northern parts of Ontario North of 50°. Here, the development of facilities and services, including sport camps, campgrounds and wilderness touring, would be entirely publicly financed, owned and managed until a point is reached when they can be turned over to Indians. Moreover, campgrounds and picnic areas would be municipally or band owned and operated in various parts of Ontario North of 50°.

Some mix of the foregoing options may represent the most effective operating principle. While the long-term aim may be to establish a private sector tourist facility and services industry, provision for a short-term public sector component to meet special conditions in parts of Ontario North of 50°, particularly in the case of Indian development, may be considered most practical.

Business Principles or Socio-Economic Principles

In the first option, the tourism industry would be expected to develop and operate under sound free-enterprise business principles rather than to be dominated by social and economic objectives. Revenues and the factor costs of production would be efficiently managed to maintain overall solvency, maximize profits and provide adequate financial reserves for depreciation, and aggressive marketing practices would be followed. Government funds would not be applied repeatedly to prop up failing business enterprises on the justification that important external socio-economic values at the community or regional levels are at stake. In contrast, the second option recognizes that socio-economic goals and objectives may be permitted to strongly influence, and perhaps dominate, performance evaluation and justify continued public financial support.

Explicit Accountability or Diffuse Political Accountability

In the first case, accountability to the public for decisions made, programs delivered and funds expended by governments would reside with the individual officers and agencies involved. Government officers and agencies would be accountable to the vitally affected

public for decisions made regarding the allocation and management of the supply foundations for tourism and the delivery of investment and marketing support programs. Moreover, the tourism industry would be accountable for the use of funds and materials supplied by various federal and provincial agencies under incentive or support programs.

In the second case, accountability to the public is left to the politicians at election time. As a result, accountability for individual decisions and programs is diffused and indistinguishable from the total performance of governments. This situation has characterized much of government involvement in tourism industry development in Ontario North of 50°.

This option of accountability is one of the most crucial of the operating principles dealt with in this study. It relates directly and significantly to some of the most contentious issues.

Individual and Corporate or Co-Operative Ownership

The ownership and operational structures of tourist facilities and services may reside with private individuals or corporations, or with co-operatives or band councils. Some aspects such as campgrounds may be handled municipally.

In the case of native facilities and services, the form of ownership and management is a critical factor. Experience to date with the goose camps in the Tidewater region suggests that individual ownership is the most productive. This observation may or may not have universal application across Ontario North of 50°.

Local Control or Outside Control

In the first case, the strategy would stress local resident ownership and control of the tourist facilities and services. In the second, it would remain neutral to the matter of control. In order to achieve local resident dominance in the industry, grants and loans on convenient and generous repayment terms could be utilized. In the neutral situation, equity and operating capital would be allowed, or even encouraged, to enter the region from any part of Ontario, Canada or the world on an equal footing.

Local or Outside Management and Employment

In the case of the first option, the strategy would stress local management and employment. Various training programs and hiring practices would be incorporated in the strategy to achieve local management and employment dominance. In the second case, without these inclusions, extra-regional influence could be strong and perhaps dominant. Some combination may be preferable. Provisions might be incorporated in the strategy and in the loan agreements with entrepreneurs to attain strong local influence and representation. The strategy may provide

for non-resident management to be hired on a contract or concession basis, and possibly some non-resident skilled labour in the introductory development and operating stages when a hands-on training approach for local residents is instituted. Considering the variety of situations present in Ontario North of 50°, a flexible approach may be considered desirable.

Short-Term or Long-Term Outlook

In the case of the first option, short-term maximization of business profits and socio-economic impacts would take precedence. In the case of the second, long-term, natural, social and economic benefits would dominate. The extremes of this dichotomy in operating principles are readily defined and recognized. At one end of the scale, the long-term preservation, enrichment and enhancement of the natural and cultural resources of Ontario North of 50°, representing the foundations of the tourism industry, and the retention of the established socio-economic patterns of the region would take precedence in decision-making. At the other extreme, the short-term maximization of profits and local employment and income impacts would dominate. The problem in this instance usually arises in situations where immediate income and employment opportunities are urgently required and detrimental long-term effects are difficult to define in an explicit manner. Long-term social impacts of artificially introduced attractions into Ontario North of 50° or the over-exploitation of long-term production levels of fish and game resources in order to generate immediate income and employment impacts in depressed locations are cases in point.

Related to Marketing Aspects

Market Factors or Resource Supply Factors as Priority Considerations

In the first case, market factors would be accorded priority significance in strategy formulation. Funds commensurate with the market research task would be provided at the outset, and no programs, projects or services would be designed, recommended and implemented that do not have an adequate market support foundation. Moreover, attempts to "sell" the product would commence at an early stage of facility development.

In the second case, at least the initial focus of strategy formulation would rest almost exclusively on identification and inventory of the natural and cultural resource supply foundations for tourism. Market investigations would be delayed or marketing opportunities would be assumed to be present for the developments proposed with no investigation whatsoever. The marketing of the service might not begin until the facility is completed, an approach that has characterized some of the past development of Indian facilities.

Broad or Narrow Geographic Perspective for Marketing

In the case of the first option, marketing operations would be geared to serve the broadest geographic perspective feasible considering the competitive strength of the resources present in Ontario North of 50°. In the case of the second, they would focus primarily or exclusively on the traditional Canadian and American market areas.

This choice is of major importance in that it has significant implications for the design of facilities and services. An international elite marketing outlook could require a high level of facilities and services. In the case of either option, government's marketing support efforts could be directed towards the stimulation of either the general tourist market segment or selected high expenditure segments, insofar as Ontario North of 50° is concerned.

Direct or Indirect Marketing

In the first option, marketing would depend primarily on direct selling techniques, as is now the case. In the second, marketing would seek to effectively exploit the full range of opportunities associated with the wholesale and retail agency structure across the world. In the international off-shore market areas, the use of agents is almost mandatory, whereas direct selling may remain the most effective and profitable approach for the traditional Canadian and American market areas.

PLANNING FUNCTION OPTIONS

APPROACH TO TOURISM DEVELOPMENT: PLANNED OR AD HOC

The issue of planning approach to tourism development confronts the provincial government with a fundamental and real choice. Tourism development has progressed steadily throughout Ontario North of 50° without the benefit of a comprehensive strategic plan. While several planning studies have been completed for tourism in northern Ontario in general, none have dealt with Ontario North of 50° in an effective manner. Moreover, their influence on development appears to have been negligible or non-existent. The strategic and district land use planning of the Ministry of Natural Resources provides no tourism sector plan of any type and carries no official status as a government commitment. Conceivably, this situation could be allowed to continue, with each new tourist facility development project or scheme being judged on its own merits.

Because the total geographic and development milieu in Ontario North of 50° into which tourist facility development is moving differs substantially from that of the area to the south, it may be considered desirable to adopt a comprehensive planning approach for tourism development, particularly for the area to the north of the 7th and 11th baselines and the Albany River. Here, the physical resource supply foundations and the social background for tourism development and operation are entirely different. In effect, the simple northward extension of previous approaches and methods will not suffice to maximize opportunities and needed adjustments to significant constraints. The dominant strength of the forest industry in the competition for the natural resources on which the tourism industry in Ontario North of 50° is largely dependent — as reflected by the vested position accorded to forestry in the strategic and district land use plans of the Ministry of Natural Resources, by the recent massive public investment in forest access roads, and by the introduction of the Forest Management Agreements — suggests an urgent and immediate need for a strong tourism sector planning response.

If the provincial government chooses to continue without the benefit of a comprehensive strategic tourism development plan, then further discussion has little meaning. In effect, all the options that follow are predicated on a positive response by government to the basic planning function option.

GEOGRAPHIC LIMITS: REGIONAL OR SUB-REGIONAL APPROACH

A single tourism strategic plan could be prepared for all of Ontario North of 50° or individual plans could be devised for its major regional components situated to the north and to the south of the 7th and 11th baselines and the Albany River.

In recognition of the distinct social and physical environmental differences and the strongly contrasting state of current tourism development in those areas situated to the south and north of the 7th and 11th baselines and the Albany River, it may be considered more expedient to prepare individual strategic plans for each area. The two could be done simultaneously. On the other hand, planning efforts could be concentrated initially in the northern portion of Ontario North of 50° and later extended to the southern portion. In this case, an overall plan for the study area could be forged later by integrating the two regional plans. Alternatively, it may be considered more manageable and feasible to approach strategic tourism planning for Ontario North of 50° as a whole. In this case, it would be necessary to recognize and accommodate the fundamental regional divisions previously noted within the more geographically expansive limits of the investigations, a requirement that may prove difficult to meet in an effective manner.

Government administrative organization may prove to be a decisive factor in the choice between these options. The Ministry of Tourism and Recreation may well require a plan for all of Ontario North of 50°. In the substantial portion of the area situated to the south of the 7th and 11th baselines and the Albany River, where major development has already occurred and native people's interests are of less importance, this Ministry is most suited to play lead and perhaps sole instigative and management roles. However, a plan is also required for native development to the north of the baselines and the Albany River. Here, the federal Department of Indian Affairs and Northern Development and the provincial Ministry of Natural Resources have significant contributions to make and may be better suited to assume lead roles, or at least to perform important catalytic and directional functions. At some point shortly after the completion of these plans, an overall synthesis in the form of a general overview strategy for all of Ontario North of 50° could be prepared. Presumably, this would be the responsibility of the provincial administrative organization for tourism. Clearly, this complex structure of administrative interests, concerns and responsibilities could have an important bearing on the selection of the most feasible option.

Whatever choice is ultimately made, tourism sector planning for the northern part of Ontario North of 50° appears to be required urgently, with substantial, consequential native involvement being a prerequisite for success.

TYPE OF PLANNING: SCOPE AND FUNCTION

A choice of major importance must be made with respect to the most efficient and effective type of planning required to guide tourism development in Ontario North of 50°. While there must be sufficient latitude to stimulate private initiative, there must also be an adequate element of government commitment, stability and control to protect investment over the long term. Equally important, there must be

adequate accommodation of other public and private interests competing for the resources of the environment if total production potentials are to be achieved.

Planning approaches may be classified according to scope and to function. In terms of scope, planning may be single-sectoral, or comprehensive and multi-sectoral. In terms of function, it may be strategic, management-oriented or operational. Any particular planning approach will combine elements of both scope and function.

In the case of tourism, planning may be confined to the tourism economic sector and culminate in a tourism development plan for all or parts of Ontario North of 50° that could be strategic, management-oriented or operational. Alternatively, tourism planning could proceed within the context of a comprehensive, multi-sectoral, socio-economic plan for Ontario North of 50°. Once again, in terms of function, the resulting comprehensive plan could be strategic, management-oriented or operational.

As regards planning scope, the sectoral approach is more manageable and has greater potential for the development of a pragmatic plan instrument to guide the operations of the tourism sector, from both government and private enterprise standpoints. The comprehensive socio-economic plan, however, provides a better opportunity for balancing competing demands and for attaining the full potential of compatible and symbiotic relationships. To some extent, these advantages can be attained through the integration of a tourism sector plan with a subsequently prepared comprehensive plan. Ultimately, both types of plans will probably be required if a decision for planned regional development is made.

Functional types of planning are indicated on Chart 8. While the description centres on government, private enterprise may, and frequently does, engage in strategic, management control and operational control planning.

A natural sequence of planning procedures is associated with the plan types outlined on Chart 8. Strategic planning, which is essentially policy and directional in nature, provides the frame of reference for consistent management control and operational control planning.

It is important to note, however, that management and operational planning can proceed without the benefit of a strategic plan. In fact, this is what is now transpiring insofar as any effective planning for tourism development in Ontario North of 50° exists at all. Unfortunately, this current procedure has a natural, inherent tendency to gravitate towards unrelated and frequently competing or antagonistic decisions. The absence of a strategic plan for the study area gives rise to many of the problems and issues currently associated with the tourism industry. Improvements in management and operational planning, particularly that involving the preparation of broader and longer-term plans, would be helpful but probably not sufficient.

The discussion that follows assumes the selection of the tourism sector plan and the strategic plan from among the options. It is noted, however, that a comprehensive socio-economic plan approach for the study area probably would be strategic in nature, in which case the discussion that follows would be applicable in a general manner.

REQUIREMENTS FOR AN EFFECTIVE STRATEGIC PLAN

At this point, it is useful to review briefly the attributes of an effective action-oriented strategic plan. These attributes should be considered in the discussion and final selection of options by government and the tourism industry in Ontario North of 50°.

Supply and demand potentials and constraints must be clearly enumerated and accommodated in a bold and imaginative manner.

The degree of comprehensiveness and complexity must approximate, but not exceed, the financial, skill and experience levels of both local government and the private investment, management and employment community involved. In effect, the strategy must challenge but not transcend the limits of available human and financial resources. This requirement is of major importance for tourist facility development by native people in Ontario North of 50°.

There must be a clear statement of priorities and a practical time schedule for program implementation in order to provide a necessary focus and sequence for the application of limited resources. Without the benefit of enormous financial and professional resources, it would be difficult, if not impossible, to proceed simultaneously across a wide front and keep local resident populations properly informed.

Action requirements must be concrete enough and the language employed precise enough to ensure that implementation performance measures can be readily applied. Broad and vague statements that are difficult to interpret generally lack the degree of conviction and commitment required to generate an action response. Moreover, the interpretation of vagaries often dissipates energies and leads to unproductive wrangling. Pilot projects that remove concepts from the realm of endless and futile discussion to concrete action can be a useful device.

Provision should be made for an interdisciplinary approach involving professionals in natural and cultural resource management, tourism development and socio-economic impact matters.

Options must be administratively simple despite the complexity of the interest groups involved.

CHART 8

TYPES OF PLANS

Type	Description
<u>Strategic</u>	Strategic planning defines the longer-term goals and objectives of government, together with the procedures and resources of government that will be employed to achieve them. The plans can be considered as comprehensive statements of values and implemental intent respecting the acquisition, maintenance, disposition, regulation and development of public physical, financial and administrative resources and anticipated private investment response.
<u>Management Control</u>	Management control planning ensures that the physical, financial and management resources of government necessary to execute the strategic plan are available. These are medium-range plans. To a large extent, the so-called strategic and district land use plans of the Ministry of Natural Resources are management control oriented.
<u>Operational Control</u>	Operational control planning ensures that specific, development support tasks are carried out and the services planned are delivered by government agencies. At the present time, the effectiveness and efficiency of government operations are monitored at this level through the budget process.

SUBSTANTIVE COMPONENTS OF A STRATEGIC PLAN

In order to provide additional appreciation of the nature of the strategic plan type option, a summary of the substantive substrategy components is presented in Chart 9. In the introductory section dealing with the classification of concepts and terminology, the topic was approached in a general manner. Options for realistic goals, objectives and operating principles have been reviewed in detail. Attention is now directed to the physical development, marketing, economic-financial and administrative component substrategies.

The strategic plan must be specific in terms of content, spatial dimension and timing. In effect, it must indicate what, how much, where and when in relation to development, marketing, financing and administration. Only in this manner can dynamic positive action, accountability and performance evaluation (efficiency and effectiveness) be attained. Accountability and performance evaluation are essential requirements, as evidenced repeatedly by the past performance of native tourist enterprises in Ontario North of 50°.

Once completed and officially approved, the strategic plan will constitute a frame of reference to guide government and private entrepreneurial decision-making with respect to individual project developments. The plan will help government agencies to assess the appropriateness of specific proposed developments and private enterprise to anticipate the financial, marketing and administrative support that will likely be made available. The strategic plan would function as a true policy instrument providing a basis for consistency in decisions by government and private enterprise.

PLANNING OPTIONS FOR INDIAN FACILITY DEVELOPMENT

Planning options for that part of Ontario North of 50° situated to the north of the 7th and 11th baselines and the Albany River call for a choice between an ad hoc, individual project approach and an integrated, phased, sectoral strategy stressing the potentials of settlements and their hinterlands for tourism development. From the viewpoint of planning administration, a choice must be made from among a unilateral government or Indian organization, a tripartite arrangement, or an Indian tourism sector program committee.

The formulation and discussion of these options presupposes a government decision to proceed with the planned development of Indian tourist facilities in the remote northern parts of Ontario North of 50° on the basis of a strategy designed specifically for these purposes. However, the discussion also has considerable relevance for the consideration of Indian facility development as part of a more comprehensive form of tourism planning involving both Indian and non-Indian elements in the sector.

From the standpoint of administrative organizational strategy, several strategies can be devised as summarized in Chart 10. Taken in total, they form an obvious integrated sequence.

CHART 9

COMPONENTS OF A STRATEGIC PLAN

I DEFINITION OF GOALS FOR THE TOURISM SECTOR**II DEFINITION OF OBJECTIVES FOR THE TOURISM SECTOR****III IMPLEMENTAL STRATEGY FOR THE ATTAINMENT OF GOALS AND OBJECTIVES****1. Statement of Operating Principles****2. Physical Development Strategy**

The physical development strategy defines the segments of the tourist plant in terms of type, quantity, general location and basic hierarchical organization. These segments may include:

a) Sport Camp Facilities

Angling Camps
Goose Camps
Game Hunting Camps
Composite Camps

b) Wilderness Travel Facilities

Summer Season Operations
Winter Season Operations

c) Community Landscape Tour Facilities

Accommodation
Food
Community Events

d) Hierarchical Area and Community Organizational Structure

In this structure the tourist facilities and services are functionally linked into an integrated development and operational system. Within the system, a number of elements or components would be recognized as indicated in the following outline, which is intended solely to provide elucidation of the concept.

CHART 9 (continued)

Broad Tourist Regions:

These are functionally defined in terms of natural and cultural attractions, accessibility and market factors. This group of regions in Ontario North of 50° might include remote interior angling, hunting and wilderness, canoe and snowmobile travel regions, the Tidewater goose hunting and Indian settlement region, the southwest road-accessible resort area.

Gateway Entrance Points:

These are points served by major scheduled airlines linked to international carrier routes, and nodal points for transcontinental highways providing access to Ontario North of 50° in general (eg., Timmins, Thunder Bay, Winnipeg).

Regional Service Centres:

These are centres for the broad tourist regions in which a complete set of accommodation, food, retail, banking, automobile and charter plane services are available (eg., Sioux Lookout, Red Lake).

Destination Communities:

These are communities from which the exploitation of surrounding hunting, fishing and wilderness experience travel is organized and contain sufficient facilities and attractions to function as an extended stop-over point, or in some cases as a final destination, in a landscape tour of communities in Ontario North of 50° by plane, boat or road. In the southwestern part of Ontario north of 50° they may function as local service centres for cottage and resort development.

Stop-Over Communities:

These are communities with sufficient attractions and services to hold landscape tourists for a brief time en route to destination communities (eg., Fort Albany, Fort Hope).

CHART 9 (continued)

3. Marketing Strategy

The marketing strategy defines the various dimensions of the market and the programs for its development, for example:

a) Target Areas

These are identified geographically and by socio-economic groupings (southern Ontario-Metropolitan Toronto, Hamilton; border states and cities - Cleveland, Detroit, Chicago, Milwaukee; New England states; Germany).

b) Estimated Volume Utilization Targets

These are expressed, for example, as X000 sportsmen per region or Y00 per facility

c) Promotional and Advertising Operations

These include media identification, sport shows, etc.

d) Development of Package Tours and Concept Testing**e) Assignment of Responsibilities**

Responsibilities are assigned in terms of government (federal, provincial), wholesale and retail components of the travel marketing organization.

4. Economic/Financial Strategy

In this strategy a number of items are carefully treated, including:

a) Capital and Operation Costs**b) Revenue Estimates****c) Sources of Funding****d) Performance Expectations/Viability****e) Economic Impacts (Employment and Income)**

CHART 9 (continued)

5. **Administrative Strategy**

In this strategy, the responsibility centres and their required response are clearly identified with respect to:

a) Physical Tourist Plant

This includes development, operation, maintenance, financing, and marketing.

b) Support Infrastructure

This includes maintenance and allocation of the natural and cultural resource supply foundations, transportation facilities, management and employee training programs.

c) Progress Review

This is particularly important in the initial stages of implementation.

Several possible types or levels of planning having distinct objectives and spatial or areal coverage are indicated in Chart 10. Type I involves general resource inventory procedures, market evaluation and development strategy planning covering all of Ontario North of 50°. The present investigations by the Royal Commission on the Northern Environment would provide an important information contribution to a study of this type. More detailed Type I investigations could be completed at the Indian Project Development Area (PDA) level. Type II planning involves the identification and feasibility analysis of the range of tourism development opportunities available to an Indian reserve or settlement. It may be undertaken with or without the broad supporting background information provided by a Type I study. The focus here is on the identification of specific tourism development opportunities in the immediate vicinity of the reserve or settlement that serves as the logistical or organizational centre for development and represents the primary socio-economic impact area. Feasibility evaluation or analysis is a distinguishing feature of this level of planning. Finally, Type III planning entails detailed planning at the individual project development level in which viability investigations become of major consequence.

CHART 10

ALTERNATIVE ADMINISTRATIVE STRATEGIES FOR VARIOUS LEVELS OF
INDIAN TOURISM DEVELOPMENT PLANNING

Administrative Organizational Strategies	Type or Level of Tourism Planning		
	I Resource Inventory, Market Evaluation and Development Planning		II Tourism Development Planning and Feasibility Analysis For Reserves and Settlements
	For Ontario North of 50°	For Indian Project Development Areas	III Project Planning and Viability Analysis
Unilateral or Joint: Federal or Provincial Agencies (DIAND, MNR, MTC)	Inappropriate, but plan output almost assured		Productive but not appropriate
Unilateral Indian: Treaty No. 3, Treaty No. 9, PDA's	Appropriate, but plan output dubious		Not applicable
Indian Camp Operators	Inappropriate		Best suited
Tripartite Arrangements: Federal, Provincial and Indian Involvement	Conceptually appropriate and attractive, but limited success to date with this organizational structure		Not applicable
Indian Tourism Sector Program Committee	Conceptually appropriate and successful in case of wild rice production and marketing planning; a modified form of tripartite; appears most promising		Not applicable



Plate 4: Successful goose hunt, Kapiskau Camp. (Source: Ministry of Tourism and Recreation.)

Unilateral planning by or under contract to federal and provincial government agencies, including the federal Department of Indian Affairs and Northern Development or the Ontario Ministries of Natural Resources and Tourism and Recreation, is considered inappropriate in that it would impose externally developed strategies and projects on native people. Essentially, these people would be placed in a position of reacting and responding to a *fait accompli*. Their involvement would tend to be limited to the contribution of information to the inventory process. However, this approach will virtually guarantee a plan output within a shorter time span and at lower costs than other approaches noted below. Unfortunately, its external authoritarian character and its detrimental impacts on overall Indian socio-economic development would render it inappropriate for Ontario North of 50°.

A unilateral Indian approach to any of the above levels or types of planning would represent an alternative with considerable appeal. At the individual project or Type III level, where the objectives and investigative process are relatively specific and contained, it would have considerable merit and deserves support. This would be especially true when an experienced Indian tourist entrepreneur is concerned with facility expansion, upgrading or some facet of horizontal or vertical integration. In this case, the Indian operator, using funds obtained from the profits of existing facility operations and possibly augmented by other sources of capital, should be able to undertake business planning, either on his own or using consultant services.

In Level I planning, involving broad area inventories of development potential and markets and culminating in strategy and facility system planning for Ontario North of 50°, responsibility might be assumed by organizations such as Treaty No. 3 or Treaty No. 9, or by the Project Development Areas, their economic development creations. Funds might be made available through private sources, but would more likely be provided by federal or provincial government agencies, particularly the Department of Indian Affairs and Northern Development or the Ministries of Tourism and Recreation, Northern Affairs or Natural Resources, acting individually or jointly. It would be desirable to have the work undertaken directly by Indian people, with or without consultant services.

The former course of action would likely flounder due to lack of experience in the tourism resource inventory and planning fields, particularly the market dimensions. Recourse might be made to government expertise to fill gaps, and the use of consultant services would undoubtedly yield a plan output. However, the Indians would probably not gain useful knowledge and experience from the process or maintain any real control over the various stages of inventory and planning. In effect, the limitations of the unilateral government agency approach would likely be present, the client relationship only having changed from government to Indian.

The tripartite approach to planning, particularly at the broad area systems levels for economic sectors, is conceptually attractive, for it recognizes and forges an effective operational link between the major interest groups. The local Indian population can be involved as the situation warrants, through political/administrative groupings such as Treaty No. 3 or Treaty No. 9, Project Development Areas such as Kayahna or the James Bay Tribal Council, or individual settlements such as Fort Hope or Fort Albany and their surrounding areas, or as individual entrepreneurs. All can be brought directly, significantly and continuously into the planning process from its introductory conceptual stages to final plan preparation and acceptance. Responsibility of the federal Department of Indian Affairs and Northern Development for the stimulation of Indian socio-economic development is recognized, extensive available planning expertise in the agency is effectively tapped, and the way is cleared for funding, probably at the 100 per cent level. Similarly, the mandate of the Ministry of Natural Resources for the management and allocation of the natural resource supply foundations for tourism in Ontario North of 50° and that of the Ministry of Tourism and Recreation for tourism development across the province are acknowledged and desirable access to a wide range of scientific expertise is secured.

Unfortunately, there are problems associated with the tripartite approach, which has not yet proved to be as productive as hoped. Part of the difficulty may be associated with the decision-making process at the general Treaty or Project Development Area administrative level. It must be acknowledged that there remains considerable uncertainty regarding the most productive means for optimizing the theoretical

advantages of the tripartite concept in the tourism sector. In brief, it would carry tourism planning into an uncharted frontier, something that generates both challenge and apprehension.

In a modified form embodying the concept of an Indian Tourism Sector Program Committee, the tripartite approach may prove productive in broad tourism sector planning for Ontario North of 50°. The economic sector committee approach has proved useful in the case of the wild rice study for all Ontario.

Indian people involved in tourism in Ontario can be divided into two main groups. One consists of the resort and recreation facility operators concerned with cottage subdivisions, marinas, campgrounds, ski slopes and special bird hunting areas. The developments of this group are located mainly in southern Ontario and well to the south of Ontario North of 50°. The second consists of the wilderness hunting and angling camp and guided tour operators, focused largely in Ontario North of 50°. Around this group, a tourism sectoral program committee could be formed to administer a tourism planning study.

In this approach, a committee made up of Indian tourist facility operators in Ontario North of 50° would initiate and control the conduct of the strategic plan study that would be funded, and to a degree co-ordinated by, the federal Department of Indian Affairs and Northern Development and the provincial Ministries of Tourism and Recreation and Natural Resources. The actual work might be executed by private consultants with substantial Indian involvement. This approach imposes initiating and controlling responsibilities on Indian tourist operators, as was the case in the 1976 study of Northern Ontario outfitting operations carried out under the direction of the Northern Ontario Tourist Outfitters Association (NOTO) with funding by the Ontario Ministry of Northern Affairs.

Under the direction of such a committee, a strategy or plan would be prepared and submitted to the Indian communities for discussion, modification and approval in principle. It would then represent an integral component of the total framework of strategic development plans of the Ministry of Tourism and Recreation. It would be submitted to the Ministry of Natural Resources for approval and integration into its resource management and allocation processes. In effect, it would provide definitive input into the strategic and district land use planning of that Ministry and the broader policy formulation of the Ministry of Northern Affairs. It would also be submitted to the Department of Indian Affairs and Northern Development for approval and thereafter serve as a substantive frame of reference for consistent funding of tourism projects under the Indian Economic Development Program.

This approach has merit and deserves further careful, detailed consideration. If executed with forethought, it would offer many of the advantages of the tripartite approach and circumvent many of its pitfalls. Primary control of development planning would rest with the Indian tourism entrepreneurial sector, where it rightly belongs. The

hassle and indecision that have often characterized the tripartite process to date would be avoided. The communities would have ample opportunity for review and input, as would the government agencies directly involved. The expertise of the latter in planning, resource and marketing matters could be tapped to the extent considered desirable by the Indian Tourism Program Committee.

In conclusion, the approach requires considerable forethought as a possible vehicle to maximize potential tourism development benefits to Indian people. However, much more is involved than the automatic placement of direct control of the study in the hands of a committee of Indian tourist operators.

CREATION OF AN INDIAN TOURIST OUTFITTERS' ASSOCIATION

The formation of a province-wide Indian Tourist Outfitters Association, modelled wholly or in part after the national tourist outfitters group established in Winnipeg in late 1981, is now under discussion in the Department of Indian Affairs and Northern Development and among some Indian operators. From a geographic perspective, there are two possible approaches to the establishment of an association of this type. A province-wide organization could be set up. Local interests and requirements might be accommodated under this approach through the creation of area or regional chapters such as northern and southern Ontario or Ontario North of 50°. Particular sectoral interests, such as winter resorts, fishing and hunting camps, boats and marinas, or summer resorts and cottages, could be satisfied through committee organization. Alternatively, a number of regional groups could be established initially and subsequently federated into a provincial and even a national Indian association.

There are distinct advantages to the latter approach. Frequently, it can be initiated more quickly and its continuing administrative requirements are usually less onerous. More important, each region tends to display a readily recognizable set of mutual interests, concerns, problems and issues arising from a similarity of facilities, marketing procedures and environmental relationships. This facilitates organization, cohesion, membership recruitment and the generation of dynamic and effective programs having a broad base of support.

Given the foregoing advantages and the fact that Indian owned and operated tourism development in Ontario North of 50° is currently confronted with a unique and pressing set of social, economic and natural environmental relationships, a separate Indian tourism association should be set up for this area without delay. This would be one of the most vital elements associated with the creation of an effective institutional administrative strategy. However, if it is felt on balance that a northern Ontario or even a province-wide association is preferable, then an area chapter or an area committee of the larger geographic units could be created.

The tasks of the association can be broadly defined as follows:

To adequately represent, reflect and protect the interests of the membership in the decision-making processes for resource allocation and management in Ontario North of 50°. At the moment, this is probably the most vital challenge facing such an association;

To influence federal and provincial tourism advertising and promotion in order to secure a favourable image for Indian tourism developments North of 50° and to develop an aggressive unified marketing strategy with sufficient flexibility for individual initiative;

To influence government funding programs for tourism development in the interest of the needs of Indian operators in Ontario North of 50°;

To support, and at times to generate, adequate supply and demand research to ensure a sustained viable industry having maximum beneficial investment, employment and income impacts for Indian operators and workers. In this regard, the association could support the undertaking of a general research and development planning program.

MARKETING FUNCTION OPTIONS

Reference has been made to marketing in the discussion of options for operating principles and the strategic planning function. At this point, options for the marketing function of the implemental strategy for tourism development in Ontario North of 50° are examined more specifically and in somewhat greater detail.

By way of introducing this topic, the essence of the earlier commentary on marketing options and requirements is briefly summarized.

Under Operating Principles

Marketing aspects will be accorded equivalence to, and in some cases priority over, supply factors in implemental strategy formulation or the consideration of marketing will be delayed until the physical development plans are prepared.

Marketing operations will assume the broadest geographic perspective commensurate with the physical resource potentials of Ontario North of 50° or they will focus essentially on traditional Canadian and American markets.

Marketing may utilize the full range of the wholesale and retail trade structure or concentrate on direct selling practices.

Under the Strategic Planning Function

The market and programs for its development, including the definition of target areas, use volume targets, promotion and advertising procedures and the assignment of responsibilities, would be defined.

The discussion that follows is launched from this background. However, the additional marketing strategy options presented involve new and somewhat unrelated concepts.

CONTINUATION OF CURRENT MARKETING ARRANGEMENTS OR INTRODUCTION OF NEW INSTITUTIONAL STRUCTURES AND PROCEDURES

In the first option, current institutional arrangements would tend to persist. In the second option, the marketing strategy would require new institutional arrangements and procedures designed to obtain an integrated and co-ordinated promotion and advertising program involving the facility operators, federal and provincial government agencies, wholesalers, retailers and carriers.

Currently, there is a generally recognized division of responsibilities in marketing. Direct selling of individual facilities and attractions is essentially the task of the individual entrepreneur. Native and non-native enterprises are active in this respect. The individual self-administered regional tourism associations, whose activities are financially supported by the province to a considerable extent, advertise and promote their areas. Ontario North of 50° falls within the geographic limits of some of these associations.

Recently the Ontario Ministry of Northern Affairs has assisted the regional tourism associations and private resort and facility operators in promotional efforts at the Sportsmen's Show in Toronto. Under provisions of the recent federal/provincial Northern Ontario Rural Development Agreement, financial aid has been provided to private operators for the preparation of literature and attendance at sports shows in the United States.

The provincial Ministry of Tourism and Recreation conducts advertising and promotion in the general market areas of Ontario and other Canadian provinces and also, to a considerable extent, in foreign markets, especially the United States. The focus is on Ontario as a tourist destination area and on its various component regions. The advertising and promotional efforts of Travel Canada are directed to the internal Canadian travel market as a whole and to foreign markets in particular. Recently, responsibility for the promotion of the foreign tourist markets has been transferred to the Department of External Affairs.

In the preparation of a marketing strategy, the foregoing institutional arrangements may be considered adequate. Attention would be focused primarily on the attainment of increased coverage for Ontario North of 50° in the advertising and promotion programs and perhaps the attainment of a stronger influence in the affairs of the local tourism associations.

In contrast, the marketing strategy may call for the creation of a new regional travel association or a special Indian travel association for Ontario North of 50°. In addition, a specially designed advertising and promotion program that effectively co-ordinates the efforts of the private entrepreneur, the federal and provincial advertising and promotion agencies, the wholesale and retail tour operators and the regional and international air carriers may be advocated. This latter option could be particularly attractive in the initial stages of strategy implementation and the opening of foreign off-continent markets.

INDIVIDUAL OR GROUP COST-SHARING ARRANGEMENTS

Individual or group cost-sharing arrangements between private entrepreneurs, government and carriers may be formulated for tourism development in Ontario North of 50°, especially in the initial operational stages, and particularly with respect to Indian-owned

facilities. Considerable effort has been made in this direction in recent years, as exemplified by provisions in the Northern Ontario Rural Development Agreement for cost-sharing of advertising and promotion in traditional markets. Funds are provided by the federal Department of Indian Affairs and Northern Development for similar activities by Indian sport camp operators. A promotional strip film was produced by the Ministry of Natural Resources for goose camps. Air Canada has co-operated with some individual operators in exploiting the German market. Continued financial support by government may be envisaged in the strategy, at least in the initial stages, particularly on a broad co-ordinated basis. Alternatively, these costs may be considered a responsibility of the private operators, carriers and travel trade structure.

